City of Seattle

Waterfront Parking Strategy

Technical Report

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Introduction

The Seattle Waterfront contains all of the elements of a working waterfront, business center, and residential neighborhood combined with numerous tourist and recreational destinations. In addition the Waterfront is physically and psychologically separated from the Seattle Central Business District by the Alaskan Way Viaduct (SR 99), which serves as a major north south travel route through Seattle. This diversity has resulted in a dynamic community that is expected to continue experiencing significant changes and challenges for a number of years.

Development on surface parking lots in the area has reduced the amount of parking available to the public while the draw of Waterfront destinations has increased parking demand. It is widely accepted that the demand for parking is greater than the perceived supply and that this deficit would increase with the anticipated increases in demand generated by planned Waterfront projects.

With an understanding of these primary issues the City of Seattle-Strategic Planning Office (SPO) contracted with Transportation Solutions, Inc. to develop a Waterfront Parking Strategy. The purposes of the project were to: provide comprehensive parking solutions for waterfront cultural, recreational, retail and tourism activities; provide solutions that do not overwhelm the area with additional traffic or detract from commercial and residential parking; and identify investments in pedestrian and transit connections that make off-site parking solutions feasible.

TSI's major tasks include market analysis, development of parking strategies, and a parking/visitor preference survey. The market analysis will enable the City and its Waterfront partners to better define current and projected parking conditions and needs. Development of parking strategies will include exploration of possible shared parking arrangements; remote parking/transit combinations; signage, wayfinding and coordinated public information programs; marketing and validation programs; valet parking programs; and siting opportunities and development issues associated with new parking facilities.

It is the purpose of this report is to document the findings of this project in order to establish a common understanding of existing parking characteristics along the Seattle Waterfront and identify strategies to meet both the existing and projected future demands for Waterfront parking.

Market Analysis

The market analysis section of this report examines existing and forecasted future parking characteristics within the Waterfront study area. In addition, an assessment is provided of factors that affect parking supply, parking demand, and general waterfront access.

A number of data sources and approaches were used to develop this profile of Waterfront parking characteristics. They include the following:

1. Off-street parking supply information is based on the 1999 Puget Sound Regional Council (PSRC) Parking Inventory Report. Data for this report were collected in April and May of 1999. This information was validated by confirming the current status of public parking lots and documenting parking supplies added since 1999.
2. Off-street parking demand data were derived from the 1999 PSRC report.
3. On-street parking supply and demand data were established by means of field counts made in June 2001.
4. Current pricing levels for off-street public parking supplies were documented by field checks to update the pricing data contained in the 1999 PSRC report.
5. The forecast of future parking supply and potential demand was made by researching existing construction activity, planned developments, and potential development opportunities that would be occupied or under construction by 2006. The primary data sources for this research were files maintained by the Strategic Planning Office and the Downtown Seattle Association.

Study Area

The study area for the project is bounded by Denny Way to the north, Atlantic Street to the south, Second Avenue to the east, and the Outer harbor Line to the west. This area was subdivided (See Figure 1) into the same parking zones utilized by the PSRC for their biennial inventory of off-street parking. In the body of the report, the zones are consolidated into North, Central, and South Waterfront Zones in order to consolidate the data and findings. The appendices contain expanded tables that detail parking characteristics within each PSRC zone. The zones within the study area and their boundaries are described in Table 1 below and illustrated in Figure 1.

Table 1: Study Area Parking Zones

Waterfront Zone	PSRC Zone	Zone Boundaries			
		North	South	West	East
South	1	Jackson St.	Atlantic St.	Harbor	2nd Ave.
	3	Yesler Way	Jackson St.	Harbor	2nd Ave.
	4	Marion St	Yesler Way	Western Ave.	2nd Ave.
Central	5	Seneca St.	Marion St.	Western Ave.	2nd Ave.
	6	Virginia St.	Yesler Way	Harbor	Western Ave.
	7	Stewart St. Lenora St.	Seneca St.	Western Ave.	2nd Ave.
North	9	Denny Way	Battery St. Virginia St.	Harbor	2nd Ave.
	10	Battery St.	Stewart St. Lenora St.	Battery St. 1st Ave.	2nd Ave.

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Parking Supply and Demand

On-Street Supply and Demand

The on-street parking supply is for the most part reserved for short-term public parking and is controlled by parking meters with a two-hour time limit. There is a limited amount of long-term on-street parking that is not controlled or has signs indicating parking restrictions. Most of this supply is located in the South zone. Lesser amounts of the on-street parking supply are reserved for load zones or other restricted short-term uses. Table 2 summarizes the on-street parking supply by Zone and separates the total supply from the supply that is readily available to the public on a typical weekday afternoon.

There are approximately 1,650 un-metered parking stalls in the study area with approximately 1,300 stalls available for public parking. The majority of the un-restricted stalls are located in the South zone. On weekday afternoons, approximately 85% of the stalls were occupied.

There are approximately, 2,100 metered stalls in the study area with the majority of them located in the North zone. The majority of the metered stalls have a 2-hour time limit and a parking fee of $1.00 per hour. On average, 68% of the metered stalls were occupied on a weekday afternoon.

Table 2: 2001 On-Street Parking Supply and Demand

Parking Type	Waterfront Parking Zone			Total
	South	Central	North	
Un-Metered Stalls				
Stalls with Restrictions				
Peak Hour	*35*	*0*	*69*	*104*
Duration	*49*	*96*	*127*	*272*
Load Zone	*39*	*127*	*133*	*299*
Motorcycle	*6*	*0*	*0*	*6*
Game Day	*18*	*0*	*0*	*18*
Reserved	*2*	*19*	*22*	*43*
Total Restricted	149	242	351	742
Total Un-Restricted	618	48	241	907
Total Supply	**767**	**290**	**592**	**1,649**
Supply Available to Public	**702**	**144**	**437**	**1,283**
Demand for Public Supply	**569**	**116**	**289**	**974**
% Occupied	*81%*	*81%*	*66%*	*76%*
Metered Stalls				
Supply	**599**	**688**	**810**	**2,097**
Demand	**373**	**514**	**541**	**1,428**
% Occupied	*62%*	*75%*	*67%*	*68%*
Total Supply Available to Public	**1,301**	**832**	**1,247**	**3,380**
Total Demand	**942**	**630**	**830**	**2,402**
% Occupied	*72%*	*76%*	*67%*	*71%*

Given the uncertain future of the Alaskan Way viaduct, the on-street parking supply under the viaduct was separated from the area wide supply. Table 3 summarizes the number of on-street parking stalls under the viaduct that would likely be impacted during construction activities. Approximately 20% of the total on-street parking supply is located under the viaduct. A portion of these stalls (25-50) are currently unavailable because of ongoing viaduct repairs.

Table 3: On-Street Parking Located Under the Alaskan Way Viaduct.

Parking Type	Waterfront Parking Zone		Totals
	South	Central	
Un-Metered	318	14	332
Metered	132	282	414
Totals	450	296	746

The metered parking supply located under the viaduct is very visible to Waterfront visitors and it is very common to observe relatively high volumes of vehicles circulating under the viaduct in search of an available stall. In order to determine how this strategic supply was being utilized a supplemental study was completed to determine the length of stay for vehicles parked in metered stalls under the viaduct. This study was conducted between 10 AM and 4 PM on a summer weekday. The results of this study are summarized in Table 4. A majority (66%) of the observed vehicles were parked for one hour or less and 83% of the vehicles complied with the two-hour tie limit. Only 17% of the vehicles exceeded the two-hour time limit.

Table 4: Length of Stay for Vehicles Parked in Metered Stalls Under the Viaduct

Length of Stay	Vehicles Observed	% of All Vehicles	2 Hour Time Limit
0 to 1 hour	341	66%	83%
1 to 2 hours	87	17%	
2 to 3 hours	32	6%	17%
3 to 4 hours	14	3%	
4 to 5 hours	37	7%	
5 to 6 hours	3	1%	
Totals	514	100%	100%

Off-Street Parking Supply and Demand

As stated in the introduction, the off-street supply and demand is based on the 1999 PSRC biennial parking survey. The parking survey divides the off-street parking supply into the following different uses:

- Short-term free parking is provided by retail businesses for their customers.
- Employee or reserved parking restricts public access through signage or gate controls.
- Public pay parking is open to the general public.

- Residential parking supplies have gate controls that restrict access to building residents.

Table 5 illustrates the off-street parking supply within the study area for 1999. The supply for the public lots in the north zone was adjusted to reflect the addition of the 1,800 stall Bell Street Garage and all public supplies were checked to confirm the accuracy of the 1999 data.

Table 5: 1999 Off-Street Parking Supplies

Parking Type	Waterfront Zone						Total	
	South		Central		North			
Short-term free	18	<1%	45	1%	152	2%	215	1%
Employee	196	5%	215	4%	802	11%	1,213	7%
Public Pay	3,850	95%	4,325	85%	5,228	73%	13,403	82%
Residential	0	0%	536	10%	1,022	14%	1,558	10%
Total	4,064	100%	5,121	100%	7,204	100%	16,389	100%

Of the 16,400 off-street parking stalls in the study area, approximately 13,400 (82%) are available for public parking. The North zone parking supply has the lowest percentage available to the public and the largest percentage restricted to employee and residential parking.

The demand for the off-street parking supply is summarized in Table 6. On average, 73% of the parking supply is occupied on weekday afternoons in the spring when the data was collected. It should be noted that some of the 1999 supply are currently construction sites and that the current demand is likely somewhat higher than represented in Table 5.

Table 6: 1999 Off-Street Public Parking Demand

Supply and Demand	Waterfront Zone			Total
	South	Central	North	
Supply	3,850	4,325	5,228	13,403
AM Demand	2,568	3,350	3,751	9,669
% Occupied	67%	77%	72%	72%
PM Demand	2,804	3,265	3,685	9,754
% Occupied	73%	76%	70%	73%

Current Pricing Rate Structure

The current parking rates charged in public off-street parking lots and garages are summarized in Table 7. The supply column in the table depicts the number of stalls within each zone that are available for a specific fee while the cost column represents the weighted average charged for each parking rate within the zone. The parking rates are lowest in the North zone and highest in the Central zone. It should be noted that some parking lot operators increase the rate for Early Bird specials during the summer months to provide additional short-term parking. The extent of this practice was not investigated.

Table 7: 2001 Parking Rates

Parking Rate	Waterfront Parking Zone								
	South			Central			North		
	Cost	Supply	% of Supply	Cost	Supply	% of Supply	Cost	Supply	% of Supply
0-2 Hours	$6.36	2,625	71%	$7.17	4,441	100%	$5.99	3,059	90%
Daily	$11.64	3,668	100%	$14.45	4,441	100%	$11.75	3,137	93%
Monthly	$170.66	2,038	55%	$172.66	3,839	86%	$125.48	1,431	42%
Early Bird	$7.76	1,288	35%	$8.91	3,839	86%	$6.94	1,274	38%
Total Supply		3,675	100%		4,441	100%		3,391	100%

A closer examination of two representative lots was made, in order to determine the relationship between long-term and short-term parking demand. Most lots in the area offer Early Bird (discounted) daily rates for vehicles arriving before 9:30 AM. While these rates decrease the need for lot monitoring and management, they also serve to decrease the short-term parking supply. The effect of long-term parking was evaluated at two lots by comparing the license plates of vehicles parked in the lots at 10 AM with those parked in the same lot at 3 PM. The parking lot at First and Stewart with a supply of 82 stalls had 31 vehicles parked in the lot throughout the day. The long-term parking demand in this lot utilizes 38% of the lot's supply. The second lot selected for evaluation is located at 1403 Western. With a supply of 45 stalls, this lot had a long-term parking demand of 31 vehicles or 69% of the available supply.

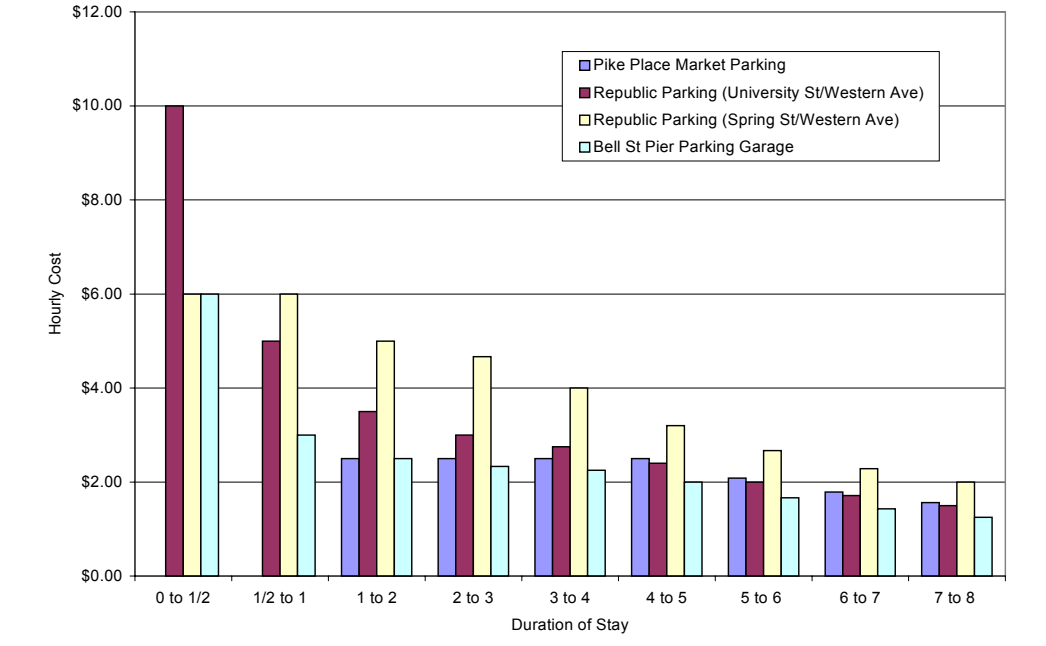
Private parking operators typically set parking rates at the maximum rate that the market will bear given their operating constraints. If there is a high demand for short-term parking, rates are often set to discourage long-term parking. If there is limited demand for short-term parking, then parking operators would encourage long-term parking through incentives such as early-bird specials and monthly parking permits. Parking operators must also factor in the cost of operating a facility. Short-term parking typically requires an attendant to be on site, while long-term parking can often be operated without an attendant. When there is high demand for short-term parking, operators can usually earn more income per parking space since the space will "turn over" several times during the day. However, if the lot cannot be easily or cost-effectively monitored for short-term parking, operators may price spaces to encourage long-term parking and give up potentially higher short-term parking revenue.

Fore example, current parking prices on the Waterfront are not set to encourage short-term parking. In the summer of 2001, the average cost of 0 to 2 hours of parking were $6.00 at the north end of the Waterfront to $7.17 in the central part of the Waterfront, and $6.36 at the south end of the Waterfront study area. For only about $1.00 more in each area, an "Early Bird" commuter could park for the entire day. Four parking facilities were surveyed in September 2001 to determine how much it would cost to park for various durations. These facilities include the Pike Place Market Garage off Western Avenue, the Bell Street Pier Parking Garage at Elliott Avenue and Wall Street, and two Republic Parking Lots on Western Avenue near University Street and Spring Streets. Figure 2 shows the parking costs by duration.

Figure 2. Total Parking Costs at Four Locations

The total cost to park was translated into hourly rates based on the duration. These hourly rates are shown on Figure 3.

Figure 3. Hourly Parking Rates at Four Locations



The figures show that only the Pike Place Market Garage's fees are set to encourage short-term parking. The other garages charge very high rates that likely encourage short-term parkers to seek on-street parking meters first for stays less than two hours. The Pike Place Market Garage currently offers the first hour free. While this is intended to generate businesses for the Market vendors, the lack of a validation system at the Market entices users to abuse this system. A modest fee for this first hour that (say $1.00) would generate additional revenue for the Market, and would not likely discourage shoppers from visiting the Market.

Factors Affecting On and Off-Street Parking Supply and Demand

Construction

Construction projects in the area frequently necessitate the removal or reduction of adjacent on-street parking supplies on a temporary basis. Permits are issued by Seattle Transportation Department to hood parking meters on a temporary basis. It has been observed that meters occasionally remain hooded when no activity is present resulting in an unnecessary reduction in the on-street supply. In addition, construction workers contribute to the demand for off-street parking.

Cruise Ship Operations

The cruise ship terminal at Pier 66 has 56 cruise ship arrivals and departures between May and October of 2001. Eleven of these arrivals and departures were port-of-calls where the vessel typically arrives in the morning and passengers disembark for the day and return for an evening departure. The number of arrivals and departures are projected to increase in 2002.

Sailings that originate from Pier 66 generate some long-term parking demand. It is estimated that cruise ship passengers generate a daily parking demand of 40 to 50 stalls during the cruise ship season. A City imposed condition for the operation of the terminal requires that long-term parking be accommodated outside of the Waterfront area. However, the City has temporarily waived this condition because of the low volume of demand and excess supply in the Bell Street garage. Cruise ship operations do not appear to be a significant contributor to Waterfront parking demand.

Special Events

Special events that affect Waterfront parking demand include the Concerts on the Pier series, Seafair activities, and events at Safeco Field. The concert series consists of approximately 20 evening performances in June, July, and August. Because the series occurs in the evening, on and off-street parking is generally available.

August Seafair activities on the Waterfront peak with the arrival and tours of the Navy fleet. During this week, it can be assumed that parking demand by Waterfront visitors is at its annual peak.

Events at Safeco Field generate parking demand on the Waterfront during the evenings and on Sundays when on-street parking is free. Event attendees will board the Waterfront Streetcar, travel to its southern terminus, and then walk the remaining distance to Safeco Field. During evening and Sunday events, the on-street parking supply is typically not available to Waterfront visitors. It may be assumed that attendees of events at the new Washington State Football/Soccer Stadium will also utilize Waterfront parking supplies when they are free.

Factors Contributing to Waterfront Access

Urban Design Factors

Seattle's waterfront is a compelling attraction for both residents and visitors to the city. Most of these visitors arrive by car, and many of them have a difficult time finding a place to park. It is clear that there needs to be a consistent and convenient way for visitors as well as repeat users to find and access waterfront parking.

Part of the dilemma seems to be that many visitors assume parking is available immediately adjacent to the Waterfront along Alaskan Way. Drivers on Alaskan Way, particularly from the south, observe cars parked under the Alaskan Way Viaduct or queued up waiting for the ferry, and assume there must be parking available. They frequently find this not to be the case but remain unaware that parking is usually available upland from the waterfront. However, even for those who are aware of upland parking, it is psychologically and physically disconnected from the waterfront by the viaduct, railroad tracks and topography.

The Bell Street Pier Garage, accessible off of Wall Street, and the Market Public Parking Garage, accessible off of Alaskan Way at Pike Street are examples of existing public parking garages in close proximity to the waterfront that are currently underutilized and that usually have parking available for waterfront users. Better signing is needed to enable drivers to find available public parking and pedestrian connections between the waterfront and the uplands need to be improved. There should be as many pedestrian connections as possible between the waterfront and the uplands, including ways to get under, over or through the viaduct, over the railroad, traversing the grade and across Alaskan Way. The Seattle Center City Open Space and Connections Strategy concurs with this recommendation.

Pedestrian routes need to be clear, identifiable, safe appearing, convenient and interesting. Some of the considerations are functional, involving easily walk able grades, good drainage, stairs with landings, and, where possible, mechanical assists. Compliance with ADA requirements is, of course, essential. The ability of visitors to find their way is largely dependent upon good signing, but is also enhanced by the use of consistent materials, the visibility of destinations and the clarity of the route. Appearance is also important. Attractive pedestrian routes invite use. Protection from wind and rain, and access to the sun can also make a pedestrian connection more attractive. Adjacent land uses and activities may be the most important. Routes that pass by retail, outdoor cafes,

vendors and places where people gather are both safer and more interesting. Good pedestrian routes also involve pleasant outlooks, viewpoints and resting places.

At the north end of the Waterfront, all four surface streets that connect Alaskan Way with Belltown could use significant improvement for pedestrians, particularly as they cross the railroad tracks. The North Waterfront Access Project recommends "zone clarification and pedestrian gates" at Broad, Vine and Wall Streets, and a pedestrian overpass at Clay.

On the north side of Broad is the site of the proposed new Olympic Sculpture Park. In addition to providing a new cultural destination on the waterfront, the Sculpture Park should also be encouraged to provide additional public parking. The proposed Potlatch Trail, which will provide a pedestrian and bicycle connection between South Lake Union and Elliott Bay, passes around the edge of the Olympic Sculpture Park along Western Avenue and Broad Street from Eagle Street to Alaskan Way. Both of these projects will increase activity at the north end of the waterfront and substantially improve pedestrian linkages between the Waterfront and the Belltown and Uptown neighborhoods and Seattle Center.

As part of its Central Waterfront redevelopment project, the Port of Seattle has recently constructed two pedestrian bridges over the railroad tracks to connect the waterfront with the uplands. The Bell Street Bridge connects the World Trade Center to Pier 66 with direct connections to Alaskan Way, Elliott Avenue and the Bell Street Pier Garage. There is also an elevator connection from the bridge to the trolley stop at Bell. The Bridge provides a very attractive pedestrian connection at a location where one is badly needed, but wayfinding to and from the east end of the bridge to the public parking in the Bell Street Pier Garage needs improvement.

The Lenora Street Bridge lands under the viaduct at its east end, with narrow sidewalks and no amenities connecting to Elliott Avenue. The signing points only to destinations, but not to parking. The west end of the bridge provides a nice overlook of the waterfront, with stairs and an elevator down to Alaskan Way. This is another attractive facility, but its effectiveness is limited by the lack of good connections to desirable destinations on the upland side.

There is an existing wooden stairway that traverses the slope between the Market's PC-1 site on Western Avenue and the Waterfront at Pine Street. This site provides one of the best opportunities to create a new, attractive and highly functional pedestrian connection to the waterfront. The PC-1 site is currently a surface parking lot, with a wooden stair connecting to the Pike Place Market. As part of the redevelopment of this site, an attractive public pedestrian connection could be provided from the Market to the waterfront, which could also include both an elevator and escalator. It would seem that the project could also include the provision of a substantial amount of public parking.

The Pike Street Hillclimb is a good example of an interesting and attractive pedestrian connection, linking the Pike Place Market to the Waterfront at the Aquarium. It is easily identifiable along the waterfront with a wide crosswalk on Alaskan Way, landscaping,

good signing, and unique light fixtures that draw the eye up the hill. There are retail uses along the route and an elevator accommodates those unable to use the stairs.

Another opportunity for a new pedestrian connection exists at Union Street. There is an existing narrow stairway that connects Western Avenue with Union Street at the level of Alaskan Way, in an area that is used for parking and storage. On the east side of Western, Union Street runs to the alley, where there is the three-story wall of a parking garage, with a public overlook on top that is at the west end of another half-block stretch of Union Street that connects to First Avenue. With a combination of public and private improvements, there is an opportunity to develop here a completely new connection to the waterfront in an area of high activity.

Harbor Steps, at University Street, represents an outstanding example of coordinated public and private improvements that resulted in the creation of a new pedestrian connection to the waterfront. All that's needed now, is for the block between Western Avenue and Alaskan Way to receive a similar quality of pedestrian amenities. The "Waterfront" gateway is an attractive element in the streetscape, but more improvements, like landscaping, street furniture, pedestrian-scaled lighting and screening of adjacent parking are needed to complete this route as an attractive connection to the waterfront. The Center City Open Space and Connection Strategy illustrates one way this might be accomplished.

Spring Street provides a relatively walk able grade from the Waterfront to First Avenue, and is the northernmost east-west street to make that connection without stairs. Sidewalks are adequate, and with the exception of a surface parking lot between Western and Alaskan Way, the route is lined with street-related buildings and uses.

Marion Street provides an important pedestrian connection to the Ferry Terminal, with a relatively level route from First Avenue to the passenger level of the terminal via a pedestrian bridge through the viaduct and over Alaskan Way. While the future of this bridge is uncertain, it seems highly desirable that a grade separated pedestrian connection to the Ferry Terminal be provided as part of any redevelopment in the area.

There are five streets that connect the waterfront with Pioneer Square, all at a level grade beneath the viaduct. Each has the potential to be enhanced, but highest priority should probably be given to Yesler Way and Jackson Street. The Center City Open Space and Connection Strategy shows one idea for improving a pedestrian crossing on Alaskan Way in this vicinity.

As improvements are contemplated for any pedestrian routes, it is important that each route be considered in its entirety, from origin to destination. While there are segments and blocks of some existing routes that are quite nice, there are few routes to and from the Waterfront that provide a consistently pleasant environment for people on foot. High priority should be given to filling in these gaps whenever possible.

Since two thirds of the visitors to the Waterfront are non-resident, it is important that visitors arriving by vehicle be able to find parking easily upon approaching their destination. This means that they should be informed of waterfront public parking locations before they enter the waterfront district. In addition, all public parking should be consistently signed with the international parking symbol, and public parking garage entrances should be clearly visible. The driveway to the Market Public Parking garage off of Alaskan Way is a primary example of an opportunity to provide improved signing, better environmental graphics and clear route identification. A differentiated footpath leading between the garage and Alaskan Way is also needed.

Signs within some existing garages are not clear about how to get to the waterfront on foot after parking. For pedestrians, directional signs need to be at points of arrival: in garages, at overpass ends, at trolley stops and bus stops. It is equally important that people be able to find their way back to parking from their waterfront destination.

Most directional signing currently on the waterfront points to destinations rather than to parking. Most waterfront destinations are quite visible and don't need big signs. Legibility of use is preferable to overwhelming identifying graphics. The Downtown Wayfinding Project recommends a hierarchy of directional signage throughout downtown Seattle. These principles should be implemented consistently throughout the waterfront.

Gray Line Waterfront Trolley

Gray Line operates a local circulator route with stops along the Waterfront, Pioneer Square, the Downtown Shopping District, Seattle Center, and the Pike Place Market. The route operates on a daily basis from May to October between the hours of 9 AM and 6 PM. The cost for a two-day pass is $16 for adults and $8 for children. The primary users of the Trolley are tourists staying in Downtown hotels.

King County Transit

King County Transit operates two routes that serve the Waterfront community. Route 16 operates between the Northgate Transit Center and the Washington State Ferry Terminal at Pier 52. The route travels southbound on Alaskan Way between Madison and Yesler with only one stop at the Ferry Terminal. The other route operated by Metro is the Waterfront Streetcar (Route 99), which has seven Waterfront stops between Broad Street and Main Street and also has stops at Occidental Park and Jackson Street in Pioneer Square. The route operates on weekdays between 6:45 AM and 6:45 PM and weekends between 10 AM and 7 PM on a 20-minute headway. The adult fare is $1.00 or $1.25 depending on the day and time. Transfers, valid for 90 minutes, are available that allow passengers the flexibility to get off or on the streetcar to sightsee.

Projected Future Parking Supply and Demand

On-Street Parking Supplies

On-street parking supplies will decrease due to one planned and two potential projects. The planned Olympic Sculpture Park will include the removal of 87 metered stalls that are located in the north extensions of the Alaskan Way right-of-way. A portion of these stalls may be retained. The Washington State Ferry System is beginning a study that could result in the removal of a portion or all of the 214 un-metered stalls on Alaskan Way between Jackson Street and Atlantic Street.

At some point in the future the Alaskan Way Viaduct will be removed and likely replaced. This would affect the 746 stalls located under the Viaduct. Improved pedestrian access, landscaping, and structure requirements would result in a net reduction in the number of stalls that are now located under the Viaduct. In total, approximately 675 on-street stalls could be removed from the public parking supply in the near future. For the purposes of this study, the following assumptions regarding reductions in the on-street parking supply have been made:

- The development of the Olympic Sculpture Park would result in the loss of 87 stalls in the Alaskan Way right-of-way.
- Washington State Ferry plans would result in the loss of 214 stalls on Alaskan Way would be lost.
- The construction of an Alaskan Way Viaduct replacement would result in a loss of 375 (50%) of the stalls that are under the existing viaduct.

Off-Street Parking Supplies

There are a number of planned and potential development projects that will affect off-street parking supplies. Table 8 summarizes the changes in parking supplies that are anticipated to occur. The appendices contain detailed tables summarizing each project. It should be noted that some of the projects included in the tables are complete or currently under construction and any public parking on the affected parcels is currently unavailable. The non-public supply is expected to increase by 4,755 stalls. This is largely due to the construction of residential developments in the North zone. The public parking supply is anticipated to decrease by 761 stalls. This is largely due to the loss of surface parking in the North zone due to residential developments.

Table 8: Summary of Projected Changes in Off-Street Parking Supplies

Waterfront Zone	Type of Parking Supply		
	Public	Non-Public	
		Restricted	Residential
South	-271	672	0
Central	-50	200	0
North	-440	1,130	2,813
Total	-761	2,002	2,813

The critical assumptions used to make the projections summarized in Table 8 include the following:

- Effects of projects that are under construction on parking supplies.
- Effects of permitted projects on parking supplies.
- Effects of planned but not permitted projects on parking supplies.

Table 9 summarizes the effect of these changes on the overall supply of on and off-street parking. The projected future parking supply will be used as a basis for calculating the need for additional supplies.

Table 9: Summary of Changes in On and Off-Street Public Parking Supplies

Type of Parking	Waterfront Parking Zone									Total 2005 Supply
	South			Central			North			
	Exist Supply	Change	Future Supply	Exist Supply	Change	Future Supply	Exist Supply	Change	Future Supply	
On- Street										
Un-metered	702	-375	327	144	-40	104	437	0	437	1,087
Metered	599	-70	529	688	-105	583	810	-87	723	2,010
Total	1,301	-445	856	832	-145	687	1,247	-87	1,160	3,097
									Net Change = -677 stalls	
Off-Street										
Public Lots	3,850	-271	3,579	4,325	-50	4,275	5,228	-440	4,788	12,642
									Net Change = -761 stalls	

Parking Demand

Parking demand is anticipated to increase due to the occupancy of planned projects as well as general increases due to the increased draw of the Waterfront as a desirable destination. It is assumed that there will be a general increase in Waterfront visitation due to the synergy created by projects in the area. The forecasted increase in parking demand is summarized in Table 10 below. This forecast includes demand generated by the proposed Waterfront Aquarium as well as other projects that are anticipated to be occupied prior to the completion of the Aquarium.

Table 10: Projected Parking Demand Scenario

Waterfront Zone and Project	Type of Parking Demand		
	Public	Non-Public	
		Restricted	Residential
South Waterfront Zone			
General Waterfront Visitation	50	0	0
Other Private Development	0	550	0
Sub-Total South	***50***	***550***	***0***
Central Waterfront Zone			
Pacific NW Aquarium	400	0	0
Pike Place Public Market	100	0	0
General Waterfront Visitation	100	0	0
Other Private Development	0	0	0
Sub-Total Central	***600***	***0***	***0***
North Waterfront Zone			
Olympic Sculpture Park	200	0	0
Residential	0	0	3,500
Cruise Ship Activity	50	0	0
General Waterfront Visitation	125	0	0
Other Private Development	0	150	0
Sub-Total North	***375***	***150***	***3,500***
Total Increase in Parking Demand	**1,025**	**700**	**3,500**

The critical assumptions used to make the projections summarized in Table 10 include the following:

- Effects of planned and permitted projects on parking supplies.
- Planned increases in Cruise Ship activity.
- Increases in general Waterfront visitation.
- Effects of the planned Aquarium and Olympic Sculpture Park on parking demand.

The projected increases in demand are divided by parking supply to project the ability of the supply to accommodate the change in demand. This information is summarized in Table 11 below.

In the South Zone, un-metered on-street stalls are projected to be at capacity while the metered stalls and off-street supplies would accommodate the projected demand. In the Central Zone, it is projected that 88% of all parking supplies will be occupied during the afternoon on summer weekdays. With effective management, this level of demand is within the functional capacity of the projected parking supply. In the North Zone, the forecasted parking supply should accommodate the projected demand.

These findings generally indicate that future parking demands would be accommodated by the forecasted supplies. This could appear to conflict with the experiences of many Waterfront visitors. The reality is that many Waterfront parking supplies are difficult to

find or access, which creates the perception of inadequate parking supplies. Waterfront retailers and parking providers have the challenge of overcoming this perception.

Table 11: Projected 2005 Public Parking Supply and Demand

Supply/ Demand	Waterfront Parking Zone								
	South			Central			North		
	On-Street		Off-Street	On-Street		Off-Street	On-Street		Off-Street
	Un-Metered	Metered	Public Lots	Un-Metered	Metered	Public Lots	Un-Metered	Metered	Public Lots
2005 Supply	327	529	3,579	104	583	4,275	437	723	4,788
2001 Demand	569	373	2,804	116	514	3,265	289	541	3,685
Change in Demand	-269	70	249	-21	-44	665	25	50	300
2005 Demand	300	423	3,053	95	470	3,930	314	591	3,985
2005 % Occupied	***92%***	***80%***	***85%***	***91%***	***81%***	***92%***	***72%***	***82%***	***83%***
2001 % Occupied	*81%*	*62%*	*73%*	*81%*	*75%*	*76%*	*66%*	*67%*	*70%*
% Increase in Demand	***+11%***	***+18%***	***+12%***	***+10%***	***+6%***	***+16%***	***+6%***	***+15%***	***+13%***

However, a closer look at what may be considered the critical area within the Central Zone where there are a number of popular destinations and parking demand is concentrated shows a projected parking deficit. This area, bounded by Western, Virginia, and Yesler, is projected to experience a future deficit of approximately 350 stalls during periods of peak demand. The existing 2001 and projected 2005 supply and demand information is summarized in Table 12 below.

Table 12: Projected Future Public Parking Supply and Demand in the Critical Area of the Central Zone (west side of Western to Water between Virginia and Yesler)

Supply/ Demand	Critical Area of Central Zone (PSRC Zone 6)					
	2001			Future		
	On-Street		Off-Street	On-Street		Off-Street
	Un-Metered	Metered	Public Lots	Un-Metered	Metered	Public Lots
Supply	13	491	1,525	13	250	1,475
Demand	13	371	1,132	13	225	1,678
Change in Demand				0	-146	+546
Occupancy	***100%***	***76%***	***74%***	***100%***	***90%***	***114%***
Increase in Demand				***+0%***	***+16%***	***+40%***
Surplus/(Deficit)		***71***	***240***	***0***	***0***	***(350)***

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Waterfront Visitor Survey

The following section discusses the methodology and findings of a survey conducted by Northwest Research Group of waterfront visitors.

Overview

The Findings in Brief offers the reader highlights of key findings from the research. The following Summary of Findings provides more detailed information about the results of this research, including differences by important major groupings.

The overall objectives of the visitor survey are to:

- Establish existing travel and parking characteristics of Waterfront visitors;
- Test visitors' willingness to consider alternative travel and or/parking arrangements;
- Determine decision drivers – location, price, group size and composition – related to parking decisions;
- Assess appropriate and preferred communication channels for downtown access, parking and travel modes.

To satisfy these objectives, an intercept survey consisting of 426 interviews with Waterfront visitors 18 years of age or older, who reside outside the study area and indicate that the Waterfront area was their intended destination was conducted. Northwest Research Group intercepted visitors at three locations along the Waterfront:

1. The east side of Alaskan way at the Pike Hill Climb
2. The west side of Alaskan Way at the Bell Street Pier
3. The west side of Alaskan Way at Pier 55 or 56

Interviewers approached visitors, introducing themselves and the study, and offering a $3 Starbucks coupon upon completion of the questionnaire. Interviewers then read the questionnaire from a paper copy, recording data for closed-response questions. Open-ended questions and questions with an "other" category were transcribed verbatim.

Major Highlights

1. Two-thirds (62%) of Waterfront visitors are not local residents.
2. One-third (33%) of all respondents carpool to the Waterfront. An additional twenty-eight percent (28%) walk to the Waterfront. Fifteen percent (15%) take the bus, while nine percent (9%) drive alone.
3. Few respondents take the Trolley to the Waterfront. Those who do walk to the Trolley pick-up point.
4. Three-quarters (74%) of all respondents considered no other modes than the one chosen for their trip to the Waterfront. One in ten (10%) indicate they did consider riding the bus. Four percent (4%) each considered carpooling, walking onto the ferry, and driving alone.
5. One-third (35%) of all respondents who drove alone to the Waterfront indicate they did so to get there more quickly. An additional twenty percent (20%) indicate they need to have their car either prior to their trip or after it, and eighteen percent (18%) indicate they drove in order to provide the flexibility to come and go as they please.
6. Fifteen percent (15%) of all respondents who did not take the bus indicate they did not do so as they are not familiar with the bus routes, fourteen percent (14%) indicate the bus was not convenient or did not fit in with their plans, while eleven percent (11%) indicate they didn't know if the bus came to waterfront or to their origin location.
   A. Visitors – respondents visiting Seattle on vacation or a business trip – are more likely than local residents to indicate they did not take the bus as they are not familiar with the routes (20% compared to 4%, respectively) and are staying nearby and found it easier to walk (11% compared to 3%).
7. Respondents who did ride the bus to the Waterfront indicate they did so because of the low cost or to save money (39%), it is convenient and easy (19%), and they didn't want the hassle of parking (18%).
8. Two-thirds (66%) of all respondents indicate they have visited the Waterfront before the date they completed the survey.
   A. However, one-third (34%) has not visited the Waterfront in the past.
   B. On average, Waterfront visitors have visited the Waterfront six times in the past year.
   C. On average, respondents spend four hours at the Waterfront.
      i) Peak arrival times for all respondents are between 9 and 11 a.m. (27%) and 1 and 3 p.m. (27%).
      ii) Peak departure times are between 1 and 3 p.m. (26%) and 3 to 5 p.m. (30%).
   D. Slightly more than half (52%) of all respondents indicate they are visiting the Waterfront to sightsee.
      i) An additional thirty-percent (30%) are at the Waterfront to visit the Waterfront itself, almost one-quarter (24%) visit the Waterfront to shop, twenty percent (20%) visit for dining purposes, an additional twelve percent (12%) visit for recreation purposes, nine percent (9%) visit for business

purposes, eight percent (8%) visit to take a cruise, while five percent (5%) visit the ferry dock and four percent (4%) visit the aquarium.

ii) As might be expected, local residents are more likely than respondents visiting Seattle on vacation to indicate they are visiting the Waterfront for business purposes – 19% compared to 3%, respectively. Conversely, respondents visiting Seattle on vacation are more likely than local residents to indicate they are visiting the Waterfront to sightsee (64% compared to 32% residents), visit the Waterfront (36% compared to 21%), and to shop (27% compared to 18%).

9. Almost a third (29%) of all respondents indicate their primary destination was the Waterfront in general.
   A. An additional fifteen percent (15%) indicate their primary destination as the Pike Place Market, twelve percent (12%) indicate the aquarium as their primary destination, and four percent (4%) each indicate they were going to shops or stores along the Waterfront, while three percent (3%) indicate they were going to restaurants.
   B. Seventeen percent (17%) of all respondents who had a secondary Waterfront destination indicate their secondary destination was the Pike Place Market.
   C. The majority (81%) of respondents indicate they had no tertiary destination on the Waterfront.
10. One quarter (25%) of all respondents who drove to the Waterfront parked in Zone 6.
   A. An additional thirteen percent (13%) parked in Zone 7, west of 2nd Avenue and within the study area. Eleven percent (11%) of participants parked in Zone 9, while ten percent (10%) each parked in Zone 5 – west of 2nd Avenue - and Zone 10 – west of 2nd Avenue.
11. Sixteen percent (16%) of all respondents who drove to the Waterfront parked in zones located outside the immediate Waterfront study area.
   A. One-third (34%) of respondents parked in a metered parking spot.
   B. An additional third (31%) parked in a lot in which they took a ticket on entrance and would pay after they were finished with their Waterfront visit.
   C. Twenty-one percent (21%) indicate they parked in a pre-pay lot and seven percent (7%) indicate they parked in free parking on the street.
12. On average, respondents indicate they did or will pay $6.50 for parking while at the Waterfront.
   A. Ten percent (10%) of all respondents who drove to the Waterfront indicate they will or have paid nothing for parking.
   B. The majority (83%) of respondents did not pay an early bird or other special rate.
13. Respondents are, on average, willing to spend up to 22 and ½ minutes looking for parking.
14. The majority (93%) of respondents who drove to the Waterfront indicate they did not do any research regarding parking options prior to traveling to the Waterfront.

   A. Those respondents who did research parking options ahead of time indicate the main reason they did so was to know ahead of time where they were going to park.

15. The best way the Waterfront could communicate parking options would be to improve signage and have a Waterfront web site with parking options listed.
16. Respondents choose parking locations because they are the first ones they see or are close to their end destination.
    A. An additional third (32%) indicate they chose the location because of its proximity to their destination. Fifteen percent (15%) indicate they chose the location because of its price, while thirteen percent (13%) cite that they had parked there before as the reason they chose that location to park.
17. Slightly less than half (44%) of respondents indicate they did pass up an open parking spot prior to finally parking their car.
    A. One-third (35%) of all respondents who drove to the Waterfront and passed up an open or available parking spot indicate they passed up the spot because it was too expensive.
18. The attributes rated of most importance to respondents are availability of parking at the Waterfront (4.2), the quickness of locating a spot (4.1), and cost of parking (4.0).
19. Overall, respondents are very positive towards the idea of using a circulator bus to the Waterfront.
    A. However, respondents who currently drive to the Waterfront - drive alone visitors and carpoolers - are significantly more likely than visitors who accessed the Waterfront via other travel modes to indicate they are less likely to use a circulator – 32% and 25% not very or not at all likely.
20. Almost one-third (29%) of respondents indicate that having more frequent buses scheduled, more buses, and improved access to buses would allow them to consider using transit or using it more often.
21. Almost two-thirds (62%) of all respondents indicate they are very likely to visit the Waterfront again in the next year.
22. On the whole, respondents are much more likely to drive and park at the Waterfront – average rating on the five-point scale of 2.5 – than to take a shuttle or taxi to the Waterfront – average rating on the five point scale of 3.8.
23. Respondents are most likely to drive, park at the Seattle Center and ride a shuttle to the Waterfront that costs from $0 to $2.00 and not at all likely to use valet parking on the Waterfront if offered for $10 to $15 for up to four hours.
24. Almost half of all respondents (45%) indicate parking would have to cost more than $25.00 before they would not visit the Waterfront. Half (53%) of all respondents indicate parking would have to cost more than $25.00 before they would use a travel mode other than a car.

Project Overview

Background and Objectives

The City of Seattle-Strategic Planning Office (SPO) has contracted with Transportation Solutions, Inc. to develop a Waterfront Parking Strategy. The purposes of the project are to: provide comprehensive parking solutions for waterfront cultural, recreational, retail and tourism activities; provide solutions that do not overwhelm the area with additional traffic or detract from commercial and residential parking; and identify investments in pedestrian and transit connections that make off-site parking solutions feasible. TSI's major tasks include market analysis, development of parking strategies, and a parking/visitor preference survey. The market analysis will enable the City and its Waterfront partners to better define current and projected parking conditions and needs. Development of parking strategies will include exploration of possible shared parking arrangements; remote parking/transit combinations; signage, wayfinding and coordinated public information programs; marketing and validation programs; valet parking programs; and siting opportunities and development issues associated with new parking facilities.

The overall objectives of the visitor survey are to:

- Establish existing travel and parking characteristics of Waterfront visitors;
- Test visitors' willingness to consider alternative travel and or/parking arrangements;
- Determine decision drivers – location, price, group size and composition – related to parking decisions;
- Assess appropriate and preferred communication channels for downtown access, parking and travel modes.

Methodology

Research Design

To satisfy these objectives, an intercept survey consisting of 426 interviews with Waterfront visitors 16 years of age or older, who reside outside the study area and indicate that the Waterfront area was their intended destination was conducted. Northwest Research Group intercepted visitors at three locations along the Waterfront:

1. The east side of Alaskan way at the Pike Hill Climb
2. The west side of Alaskan Way at the Bell Street Pier
3. The west side of Alaskan Way at Pier 55 or 56

Interviewers approached visitors, introducing themselves and the study, and offering a $3 Starbucks coupon upon completion of the questionnaire. Interviewers then read the questionnaire from a paper copy, recording data for closed-response questions. Open-ended questions and questions with an "other" category were transcribed verbatim.

Intercept interviewing occurred on Thursday, August 9, 2001 from 10:00 a.m. to 4:00 p.m., and Saturday, August 11, 2001 from 10:00 a.m. to 6:00 p.m. The study utilized a convenience sample of visitors who were intercepted as they entered or exited the Waterfront area. Northwest Research Group approached 1,236 Waterfront visitors, resulting in a total of 426 completed interviews. The final sample size of 426 was distributed as follows:

Pike Hill Climb	n=172
Bell Street Pier	n=110
Pier 55 or 56	n=144

Questionnaire

The questionnaire used a variety of question formats, including closed single and multiple-response questions for all categorical data. In those situations where all possible responses were not known, an "other" category was included. These results were then reviewed and, where appropriate, post-coded into the database. All attitude and evaluation questions used scaled response formats. Scales were typically five points in length. Five open-ended questions were included to provide further clarification of quantitative data on reasons for riding or not riding the bus, reasons for deciding for or against researching parking options, information sought when researching parking options, and suggestions for improvements to public transportation along the Waterfront. Based on a review of these responses, a code list was developed to capture the range of responses. Results from these open-ended questions were then coded and entered into the respondent database.

Screener

- Trained interviewers screened respondents to ensure that they met the definition of a qualified respondent.
- A qualified respondent was defined as: An individual, 16 years of age or older, who resides outside the study area and indicates that the Waterfront area was their intended destination.

Content

The survey instrument contains the following major sections:

- Introduction/Screener
- Travel Mode
- Waterfront Usage
- Parking Behavior
- Parking Perceptions
- Future Use
- Demographics

A total of up to 66 questions were included in the questionnaire. The survey took an average of 6 to 7 minutes to complete. A copy of the questionnaire is included in the Appendix.

Statistical Significance

In interpreting survey results, readers should keep in mind that all surveys are subject to sampling error. Sampling error is the extent to which the results may differ from what would be obtained if the whole population were surveyed. The size of such sampling error depends completely on the number of interviews completed. The larger the sample, the smaller the sampling error.

The overall margin of sampling error for this survey for questions asked of all respondents is plus or minus 4.9% percent. The following table illustrates the error associated with different proportions at different sample sizes and can be used to determine sampling error for subgroup analysis.

TSI chose to conduct 400 interviews in order have a low margin of error - plus or minus 4.9%.

Error Associated With Different Proportions At Different Sample Sizes
At The 95% Confidence Level

	Estimate				
Sample Size	**10% 90%**	**20% 80%**	**30% 70%**	**40% 60%**	**50% 50%**
50	8.3%	11.1%	12.7%	13.6%	13.9%
100	5.9%	7.8%	9.0%	9.6%	9.8%
200	4.2%	5.5%	6.4%	6.8%	6.9%
300	3.4%	4.5%	5.2%	5.5%	5.7%
400	2.9%	3.9%	4.5%	4.8%	4.9%
500	2.6%	3.5%	4.0%	4.3%	4.4%
1,000	1.9%	2.5%	2.8%	3.0%	3.1%
1,200	1.7%	2.3%	2.6%	2.8%	2.8%
2,400	1.2%	1.6%	1.8%	2.0%	2.0%

Differences in responses among key subgroups are an important focus of analysis (e.g., travel mode to Waterfront, parking location, resident status, etc.). If a particular difference is large enough to be unlikely to have occurred due to chance or sampling error, then the difference is *statistically* significant. If results or numbers are different to the extent that the difference would matter from a managerial perspective, the difference is *practically* significant. To be *practically* significant, the difference must be *statistically* significant. However, a *statistically* significant difference may not be *practically* significant.

Report Format

Extensive analysis of the data was completed. This report summarizes the major findings for each of the topics and provides an overview of the whole as well as by key subgroups.

The following notes describe the reporting conventions used in the report.

- The report is organized by major topic area. Tables and charts provide supporting data.
- Information about the overall results for each topic area is presented first, followed by relevant, statistically and practically significant differences between key subgroups. The probability level for determining statistical significance is < .05 (unless otherwise noted). When significant differences (assuming a 95 percent confidence level) were observed among important market segments (e.g., travel mode to Waterfront, parking location, resident status, etc.), they were noted in the written text of the report and boldfaced in the accompanying tables.
- In most charts and tables, unless otherwise noted, column percents are used. Percents are rounded to the nearest whole number. Note that some percentages in this report may add up to more or less than 100 percent because of rounding, the permissibility of multiple responses for specific questions, or based on the presentation of abbreviated data.
- Except where noted, tables and charts provide information from respondents who offered opinions to a question. "Don't knows" and "refusals" are counted as missing values unless "don't know" is a valid or meaningful response. The "no answer" category is not included in the analysis generating the graphics.
- Complete documentation of the data analysis (in the form of banners) is kept separately. These banners are useful in providing easy-to-use documentation of the results of all questions broken out for important subgroups of the sample. One set of banners was run providing insight into how important subgroups responded to each question.

Survey Results

The following summarizes the important findings from the survey. Charts and tables are used to highlight these findings.

Respondent Characteristics

Overall, respondents are visiting the Waterfront for vacation or business purposes rather than local residents, between the ages of 35 to 54 (48%) – with an average age of 42 years old, are employed full-time (62%), are not traveling with children (80%) and earn household incomes of $50,000 or more per year.

Waterfront visitors visit the Waterfront with one or more additional person in their group (72%):

- Respondents with children are more likely than those without to indicate they are visiting with 3 to 5 people (71% compared to18%), whereas those without children are more likely to indicate they are visiting with one other person (43%) or by themselves (35%).
- Forty-eight percent (48%)of carpoolers indicate they are visiting in a group of 3 to 5 people.
- Forty-two percent (42%) of respondents who are visiting the Waterfront as part of a vacation or business trip indicate they are visiting with one other person, while local residents are more likely to indicate they are visiting the Waterfront alone (39%).

FIGURE 4: GENDER

(BASE: All Respondents [n = 426])

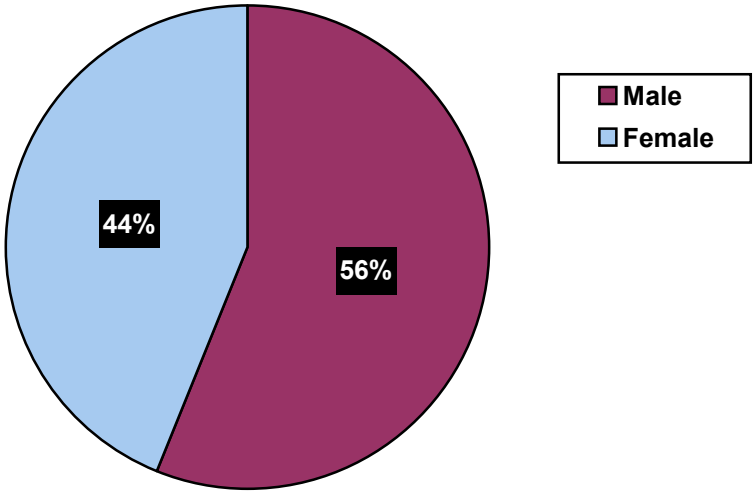


FIGURE 5: RESIDENT STATUS
(BASE: All Respondents [n = 426])

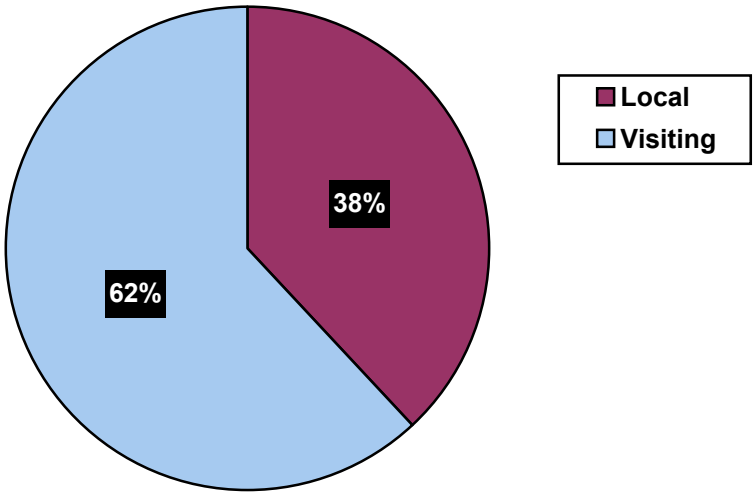


FIGURE 6: NUMBER OF PEOPLE IN VISITOR PARTY
(BASE: All Respondents [n = 426])

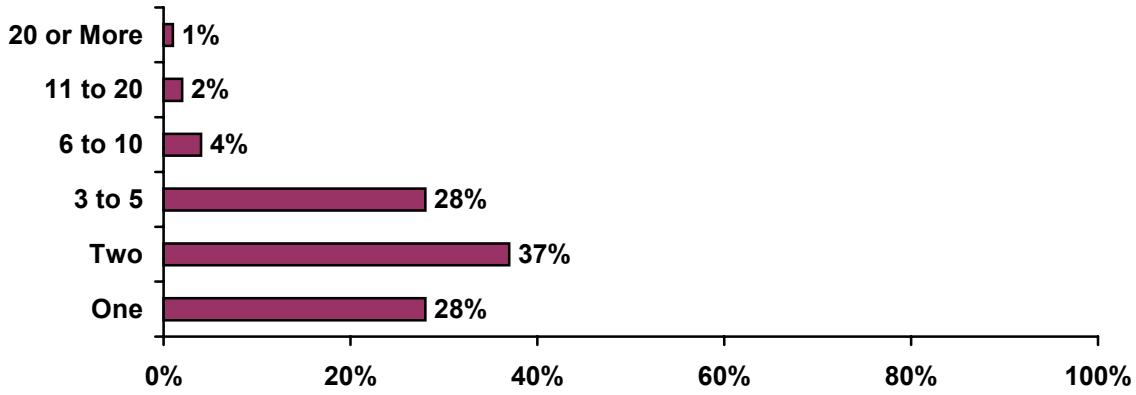


FIGURE 7: NUMBER OF PEOPLE IN VISITOR PARTY BETWEEN THE AGES OF 18 AND 35
(BASE: All Respondents [n = 426])

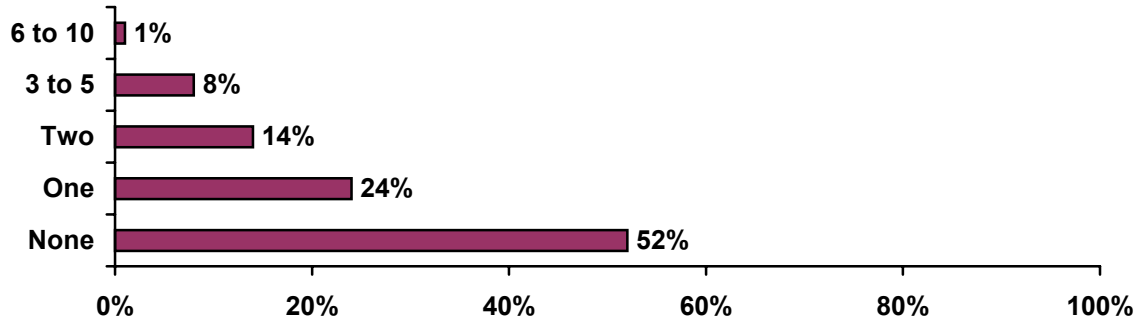


FIGURE 8: NUMBER OF PEOPLE IN VISITOR PARTY BETWEEN THE AGES OF 36 AND 65
(BASE: All Respondents [n = 426])

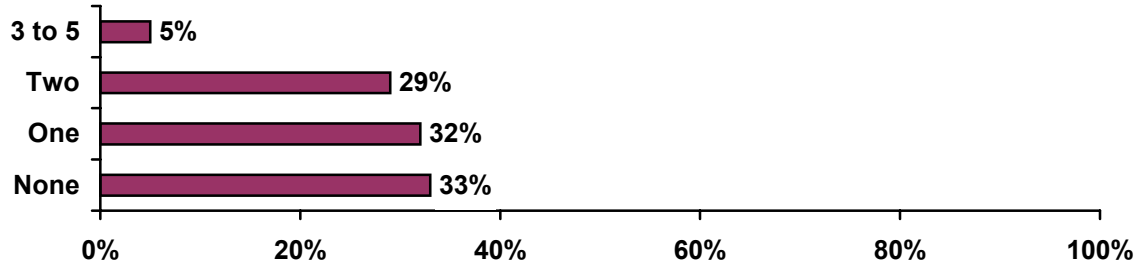


FIGURE 9: NUMBER OF PEOPLE IN VISITOR PARTY OVER 65
(BASE: All Respondents [n = 426])

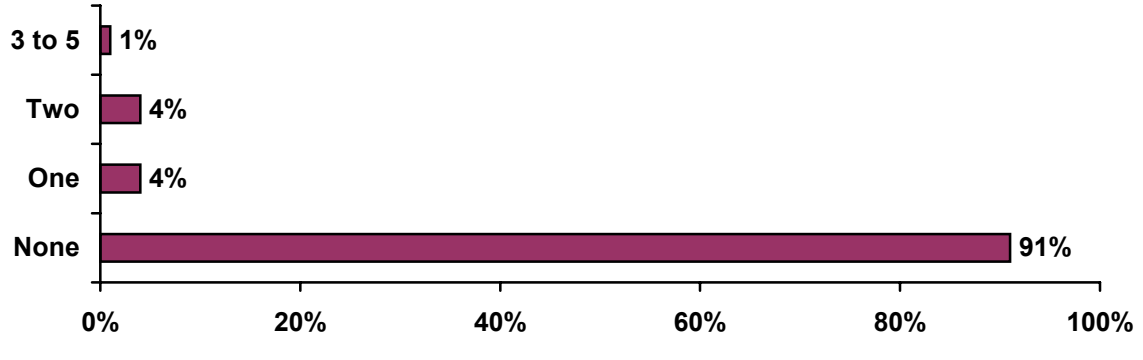


FIGURE 10: NUMBER OF PEOPLE IN VISITOR PARTY BETWEEN 10 AND 18
(BASE: All Respondents [n = 426])

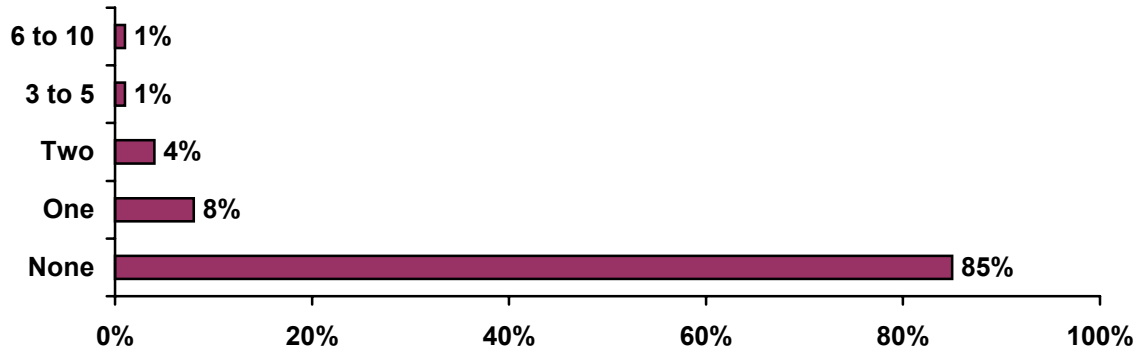


FIGURE 11: NUMBER OF PEOPLE IN VISITOR PARTY 9 OR YOUNGER
(BASE: All Respondents [n = 426])

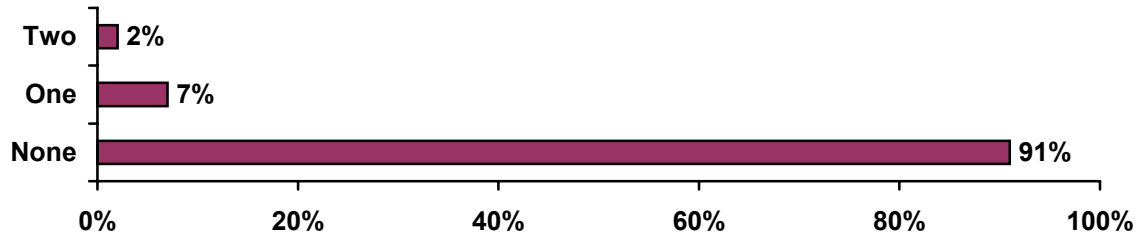


FIGURE 12: RESPONDENT AGE
(BASE: All Respondents [n = 426])

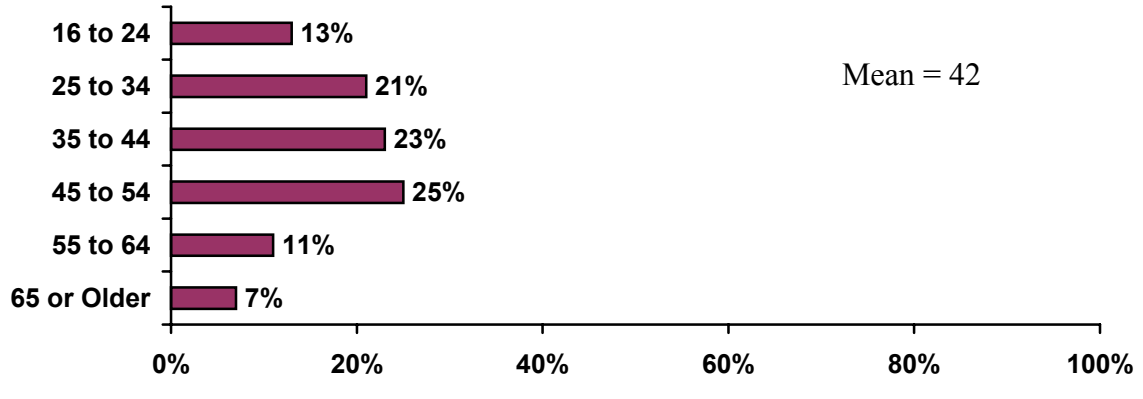


FIGURE 13: EMPLOYMENT
(BASE: All Respondents [n = 426])

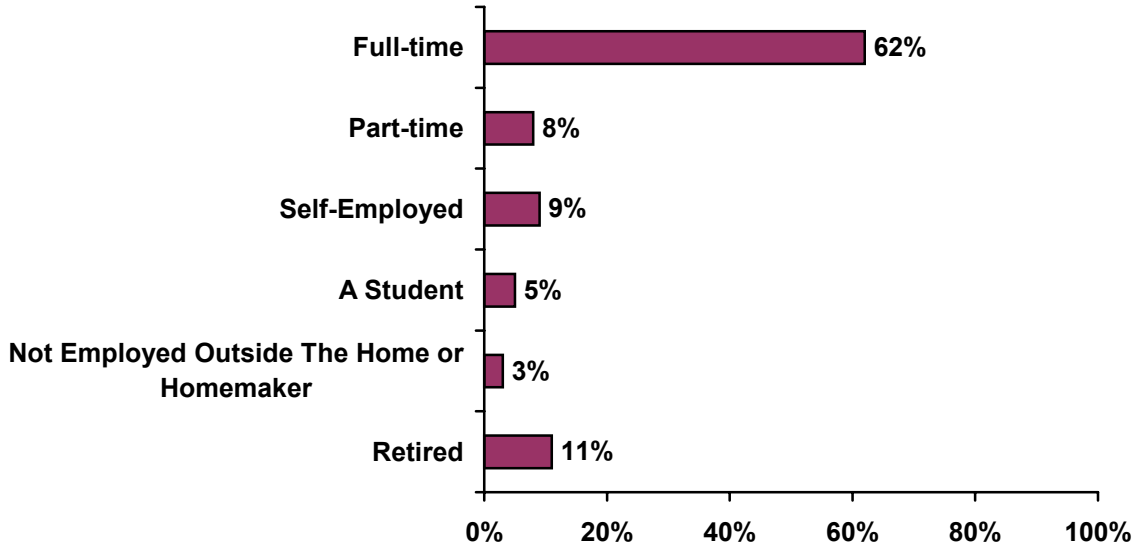
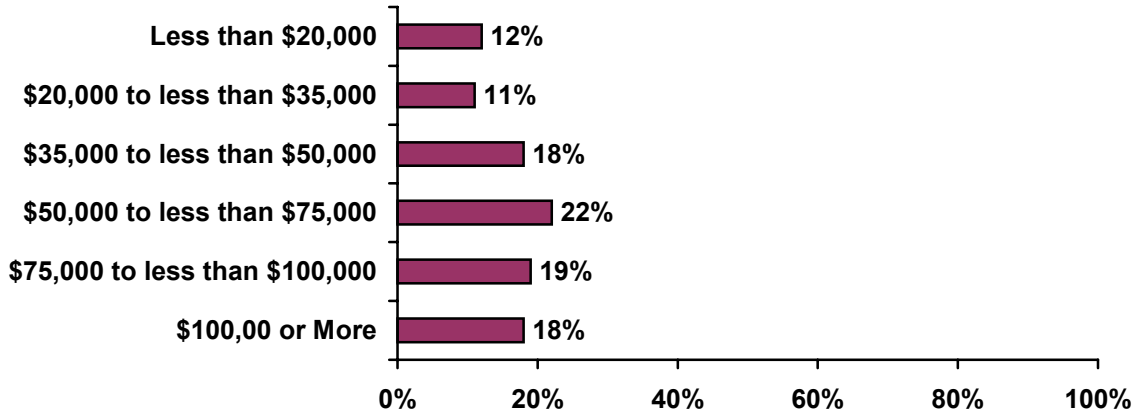


FIGURE 14: INCOME
(BASE: All Respondents [n = 426])



Travel Mode to Waterfront

All respondents were asked to indicate how they traveled to the Waterfront on the day the survey was administered.

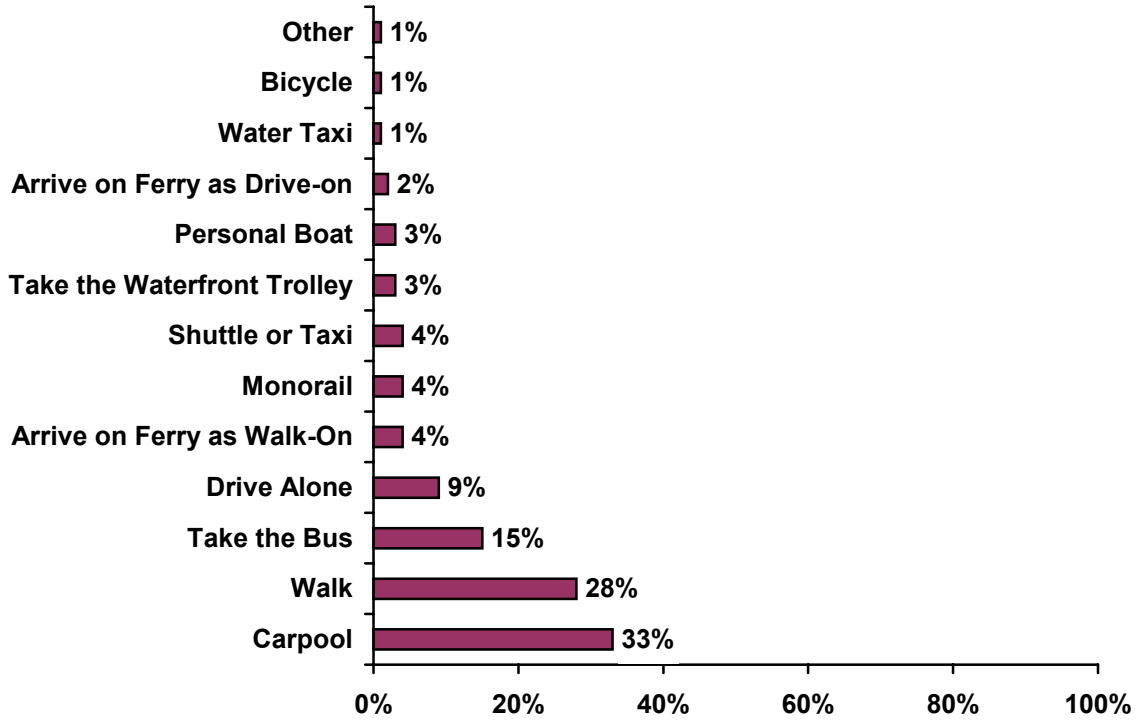
One-third of all respondents carpool to the Waterfront.

Respondents who indicate they are visitors to the area - visiting Seattle on vacation or a business trip – are more likely than residents to indicate they carpool to the Waterfront. As might be expected, respondents with children in their party are more likely than those without to indicate they carpool to the Waterfront.

An additional twenty-eight percent (28%) indicate they walked to the Waterfront. Note that over three-quarters (77%) of all walkers are non-residents, e.g. visiting Seattle on vacation or a business trip. Based on additional data recorded by interview personnel, thirty-four percent (34%) of walkers stayed at hotels within walking distance to the Waterfront.

FIGURE 15: MODE OF TRAVEL TO WATERFRONT

(BASE: All Respondents [n = 426])

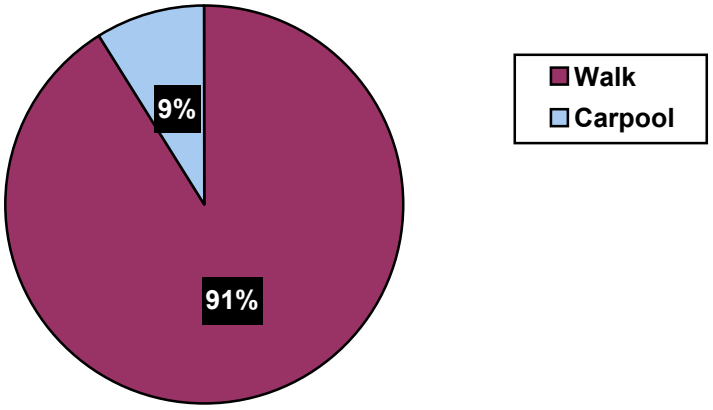


Respondents who indicate they take the waterfront trolley were asked how they got the place they boarded the trolley.

The majority (91%) of respondents who took the trolley indicate they walked to the trolley.

An additional nine percent (9%) indicate they carpooled to the site where they boarded the trolley. Note that cell sizes for this group are extremely small (n=13).

FIGURE 16: TRAVEL MODE TO PLACE BOARDED TROLLEY
(BASE: Respondents who Traveled to the Waterfront Via Trolley [n = 13])



All respondents were asked to indicate if they had considered any other modes of travel to the waterfront, and if so what those modes were.

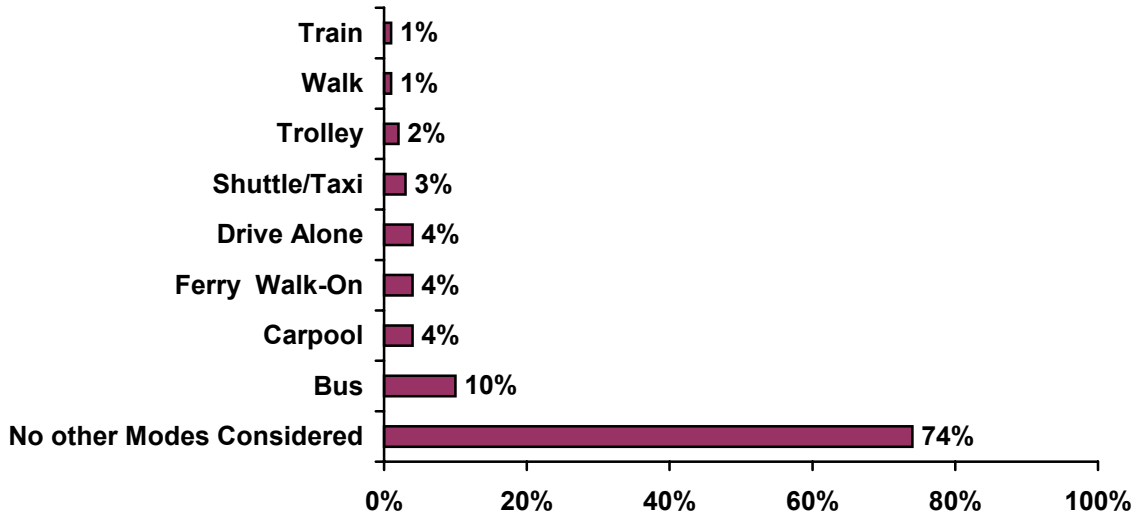
Three-quarters (74%) of all respondents considered no other modes than the one chosen for their trip to the Waterfront.

One in ten (10%) indicate they did consider riding the bus. Four percent (4%) each considered carpooling, walking onto the ferry, and driving alone.

Twenty-percent (20%) of those who drove alone indicate they considered riding the bus.

Sixteen-percent (16%) of those who took the bus indicated they also considered carpooling. An equal number of buss riders (16%) also indicate they considered driving alone.

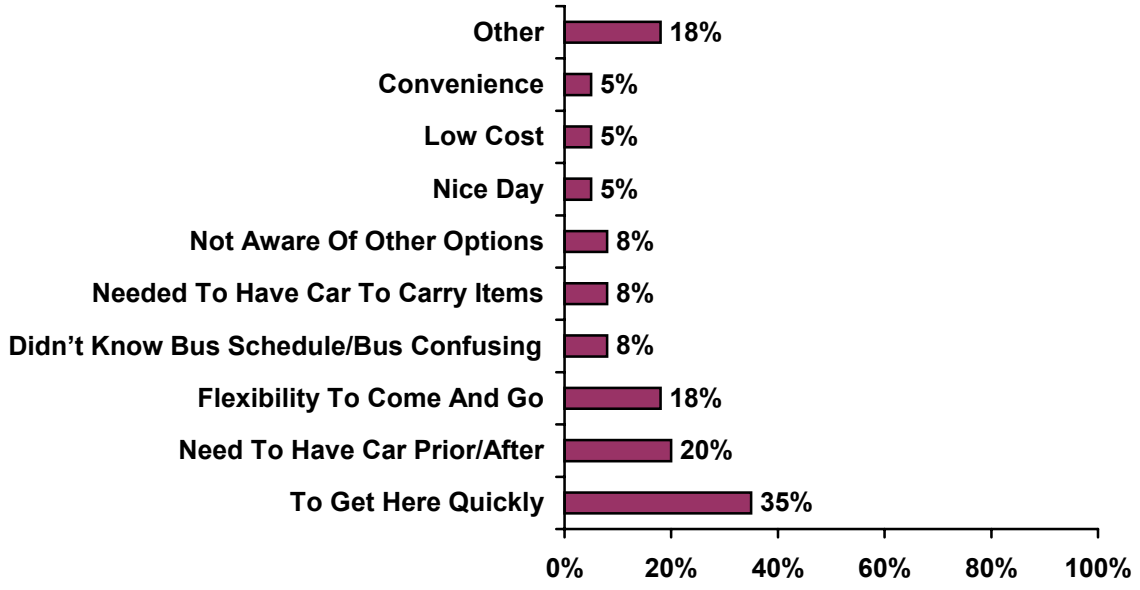
FIGURE 17: ALTERNATIVE MODES CONSIDERED
(BASE: All Respondents [n = 426])



Each respondent was asked to indicate the reason or reasons they chose their specific travel mode.

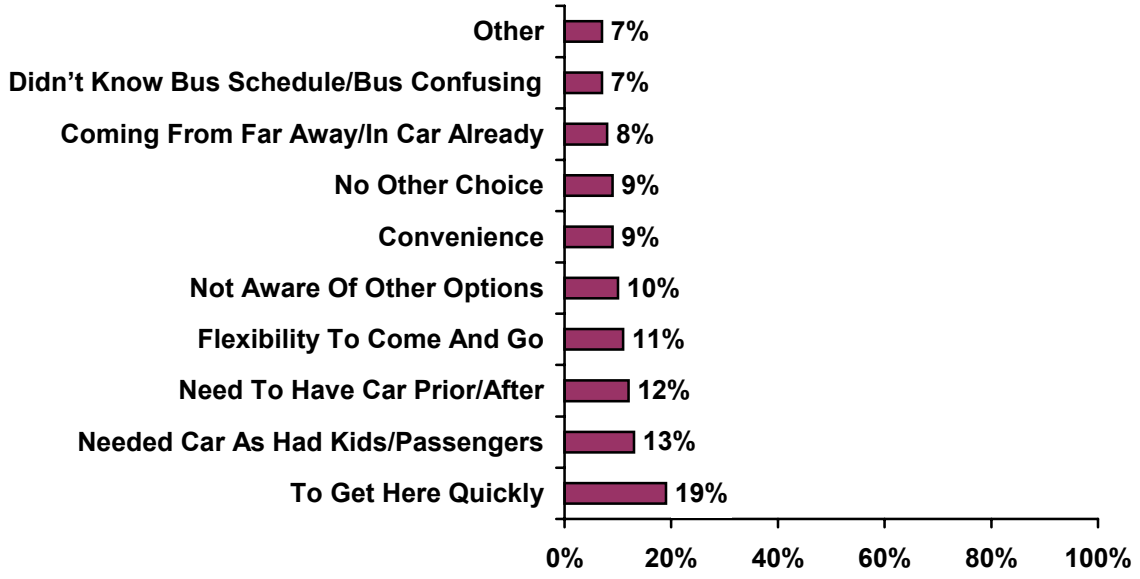
One-third (35%) of all respondents who drove alone to the Waterfront indicate they did so to get there more quickly. An additional twenty percent (20%) indicate they need to have their car either prior to their trip or after it, and eighteen percent (18%) indicate they drove in order to provide the flexibility to come and go as they please.

FIGURE 18: DRIVE-ALONE VISITORS – REASON FOR CHOOSING MODE
(BASE: DRIVE-ALONE VISITORS [n = 40])



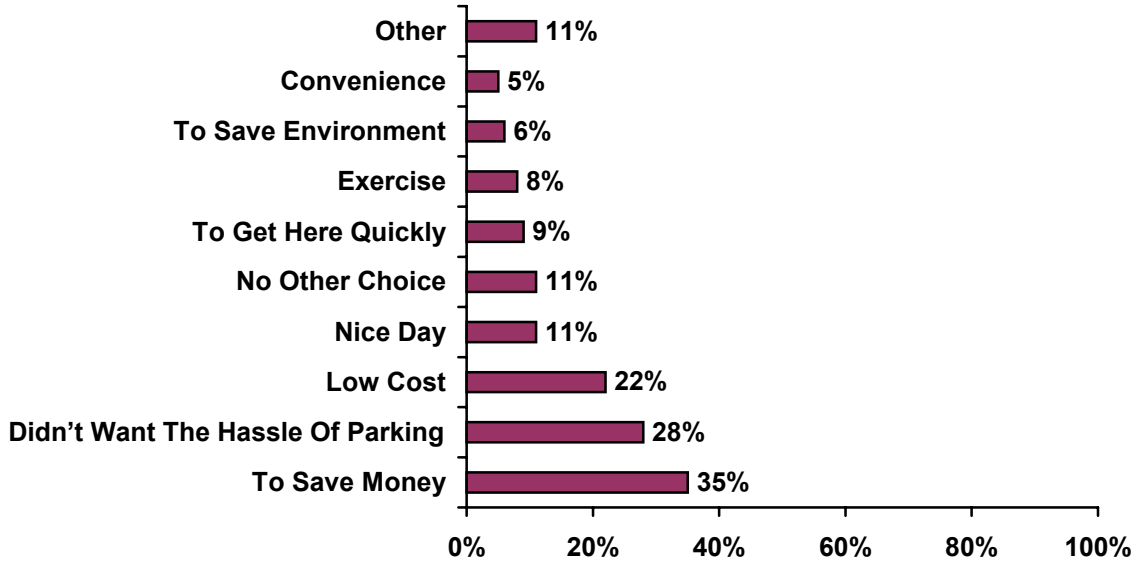
Nineteen percent (19%) of carpoolers indicate they chose this method to get to the Waterfront more quickly, fourteen percent (14%) indicate they need to have their car as they have kids or passengers, while twelve percent (12%) indicate they need to have their car either prior to their trip or after it, and nine-percent (9%) indicate they had no other choice or were not aware of other options.

FIGURE 19: CARPOOL VISITORS – REASON FOR CHOOSING MODE
(BASE: CARPOOL VISITORS [n = 140])



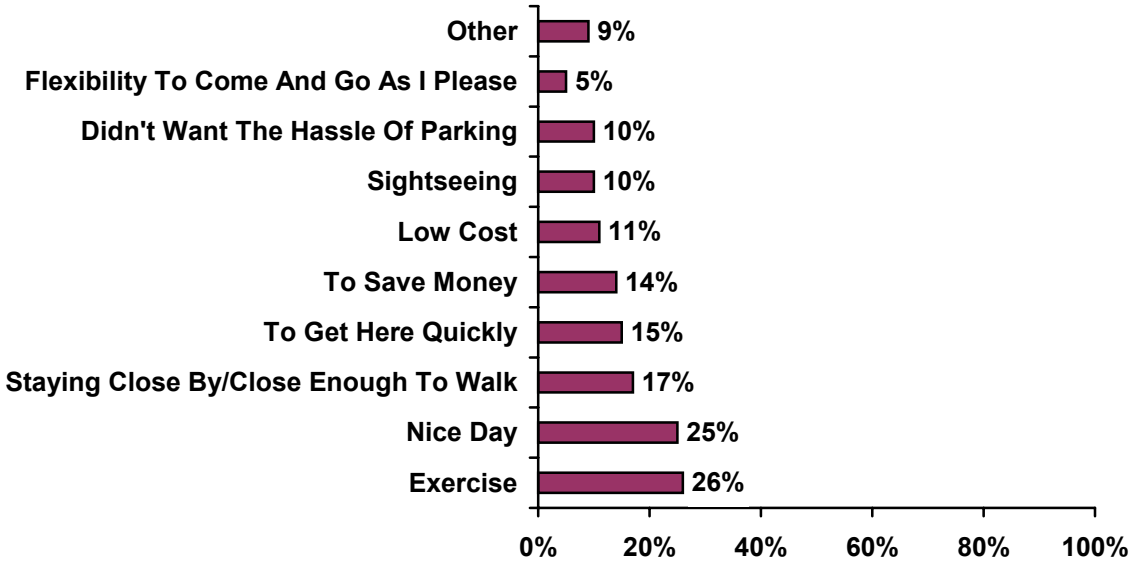
One-third (35%) of those who rode the bus to the Waterfront indicate they chose this mode to save money. Additionally, twenty-eight percent (28%) indicate they bussed as they did not want the hassle of parking. Twenty-two percent (22%) indicate the low cost of the bus ride was a factor in their decision, while an equal number (11% each) indicate they rode the bus as it was a nice day or they had no other choice.

FIGURE 20: BUS VISITORS – REASON FOR CHOOSING MODE
(BASE: BUS VISITORS [n = 66])



Slightly more than a quarter (26%) of those respondents who walked to the Waterfront indicate they chose this mode for the exercise. A similar number (25%) indicate they walked as it was a nice day, while seventeen percent (17%) indicate they were staying close by or close enough to the Waterfront to walk. An additional ten percent (10%) indicate they did not want the hassle of parking.

FIGURE 21: WALKING VISITORS – REASON FOR CHOOSING MODE
(BASE: WALKING VISITORS [n = 118])



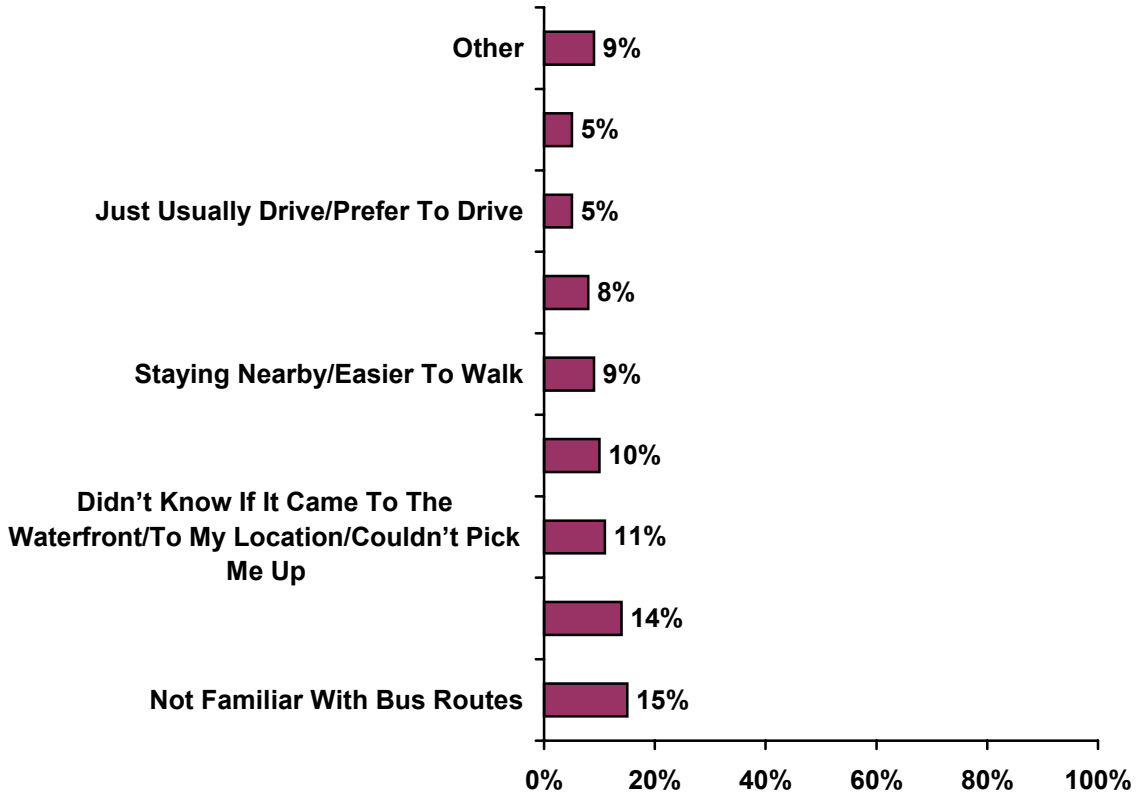
Respondents who did not take the bus to the Waterfront were asked to indicate the main reason they did not choose the bus.

Fifteen percent (15%) of all respondents who did not take the bus indicate they did not do so as they are not familiar with the bus routes, fourteen percent (14%) indicate the bus was not convenient or did not fit in with their plans, while eleven percent (11%) indicate they didn't know if the bus came to waterfront or to their origin location.

Visitors – respondents visiting Seattle on vacation or a business trip – are more likely than local residents to indicate they did not take the bus as they are not familiar with the routes (20% compared to 4%, respectively) and are staying nearby and found it easier to walk (11% compared to 3%).

Eleven percent (11%) of respondents with children in their party indicate the fact that they had children with them was the main reason they did not take the bus.

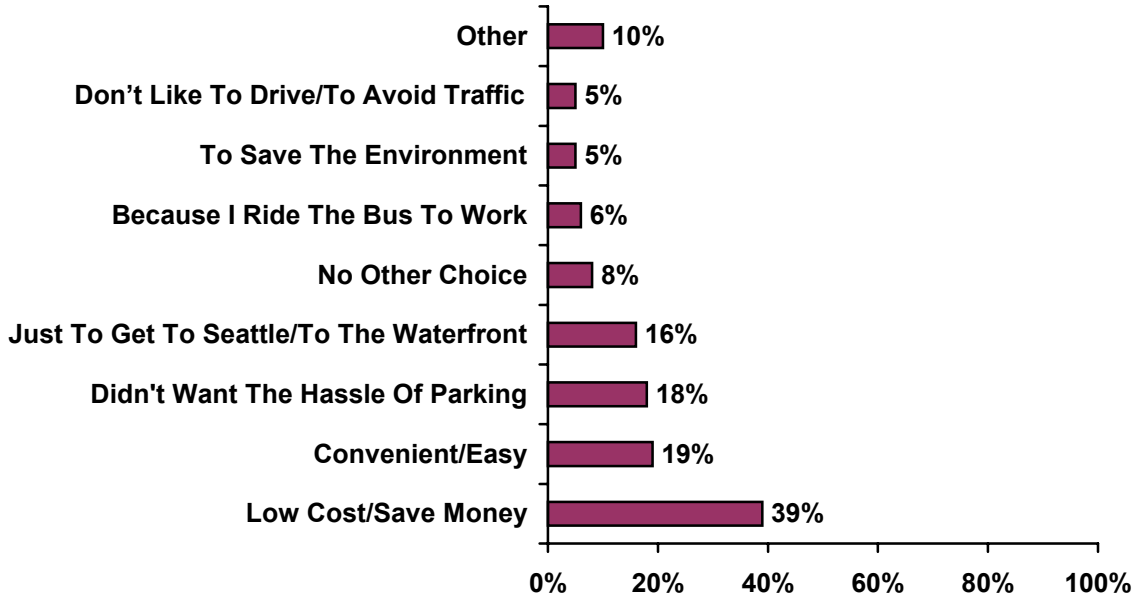
FIGURE 22: REASONS DID NOT CHOOSE BUS TO WATERFRONT
(BASE: RESPONDENTS WHO DID NOT TAKE BUS TO WATERFRONT [n = 360])



Respondents who did take the bus to the Waterfront were asked to indicate the main reason they chose the bus.

Respondents who did ride the bus to the Waterfront indicate they did so because of the low cost or to save money (39%), it is convenient and easy (19%), and they didn't want the hassle of parking (18%).

FIGURE 23: REASONS DID CHOOSE BUS TO WATERFRONT
(BASE: RESPONDENTS WHO DID TAKE BUS TO WATERFRONT [n = 66])



Waterfront Usage

All respondents were asked to indicate if they had ever visited the Seattle Waterfront prior to the survey date.

Two-thirds (66%) of all respondents indicate they have visited the Waterfront before the date they completed the survey.

However, one-third (34%) has not visited the Waterfront in the past.

The majority of those who drive alone (85%) or bus (82%) to the Waterfront indicate they have visited the Waterfront in the past.

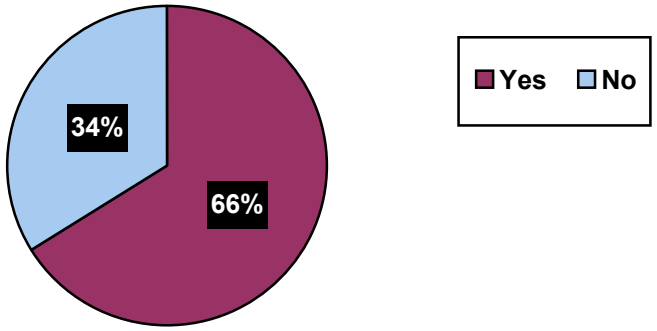
Fewer (61%) carpoolers and walkers (55%) are repeat visitors.

As might be expected, local residents are significantly more likely than visitors - respondents visiting Seattle on vacation or a business trip - to indicate they had visited the Waterfront in the past – 93% compared to 50%, respectively.

The majority (80%) of respondents who indicate they parked at a meter have visited the Waterfront in the past, as have the majority (91%) of those who parked for free.

FIGURE 24: VISITED WATERFRONT BEFORE TODAY

(BASE: ALL RESPONDENTS [n = 426])



Respondents who have visited the Waterfront in the past were asked to indicate how often they have visited the Waterfront in the past year.

On average, Waterfront visitors have visited the Waterfront six times in the past year.

People who ride the bus visited the Waterfront 12 times in the past year, while carpoolers visited 4 times in the past year, those who drove alone 7 times and walkers 5 times.

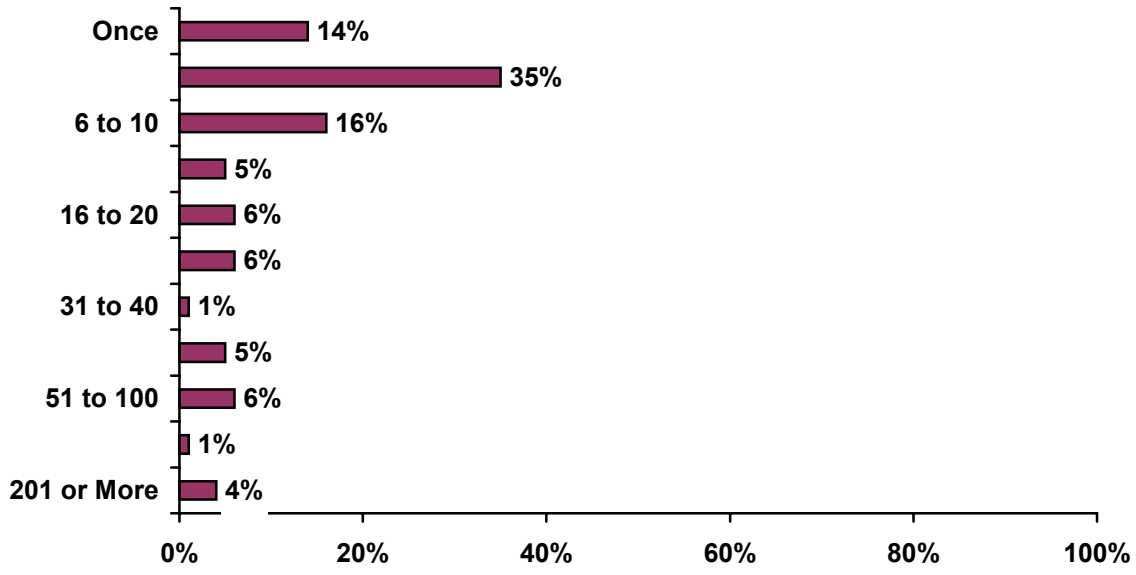
As might be expected, local residents visited the Waterfront significantly more often than respondents visiting Seattle on a vacation or a business trip - 15 times compared to 2 times in the past year.

Respondents who indicate they are at the Waterfront for recreation purposes visited the Waterfront significantly more often than those who visit for shopping, dining, or sightseeing purposes.

Again, as might be expected, those respondents who parked in a free lot or space visited the Waterfront more often in the past 12 months than respondents who paid for parking.

Respondents without children in their party on the day of the survey indicate a significantly higher number of visits to the Waterfront in the past year than those with children.

FIGURE 25: NUMBER OF VISITS TO WATERFRONT IN PAST YEAR
(BASE: Respondents Who Have Visited Waterfront Previously [n = 282])



Respondents were asked to indicate the time they arrived at the Waterfront and the time they were leaving the Waterfront. Using this information, the average amount of time spent at the Waterfront was calculated by figuring the difference in time between respondents' arrival and departure time at the Waterfront.

On average, respondents spend four hours at the Waterfront.

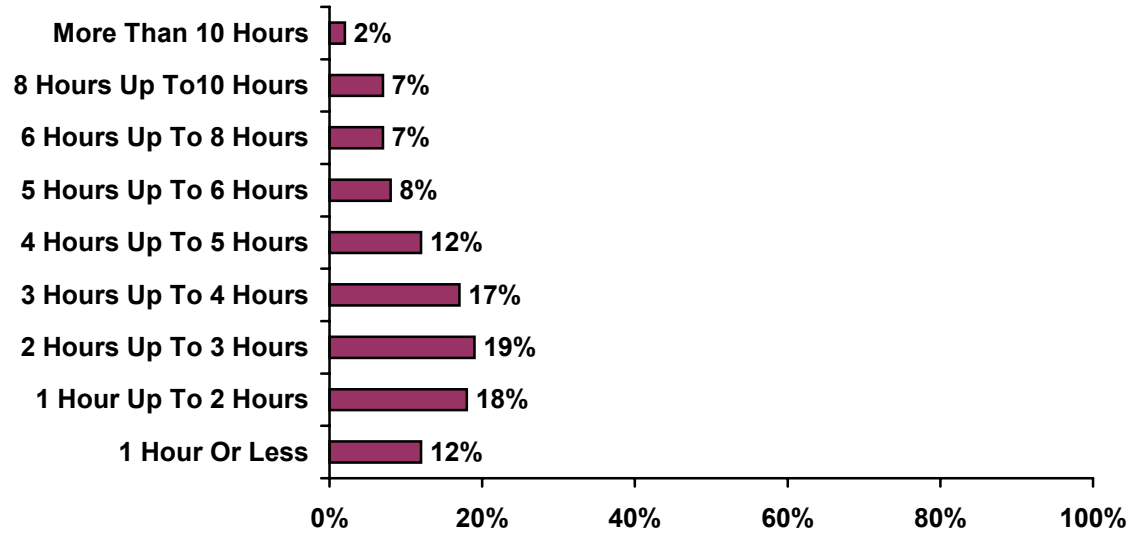
Walkers spend significantly less time at the Waterfront that those who travel to the Waterfront via other modes – on average walkers spend three hours at the Waterfront.

Walkers are also significantly more likely than other travel mode comparison groups to indicate they spend one hour or less at the Waterfront.

Respondents who indicate they are visiting the Waterfront for the purpose of taking a cruise spend significantly more time at the Waterfront than those who visit the Waterfront for other purposes – an average of five hours. The high average amount of time spent at the Waterfront recorded for respondents who visited the Waterfront to take a cruise may be misleading, as that entire time does more than likely include their cruise time – time spent away from the Waterfront on the cruise itself.

Respondents who pay either before or after their time at the Waterfront spend significantly more time at the Waterfront than those who pay for meter parking - 4.8, 4.6, and 3.6 hours, respectively.

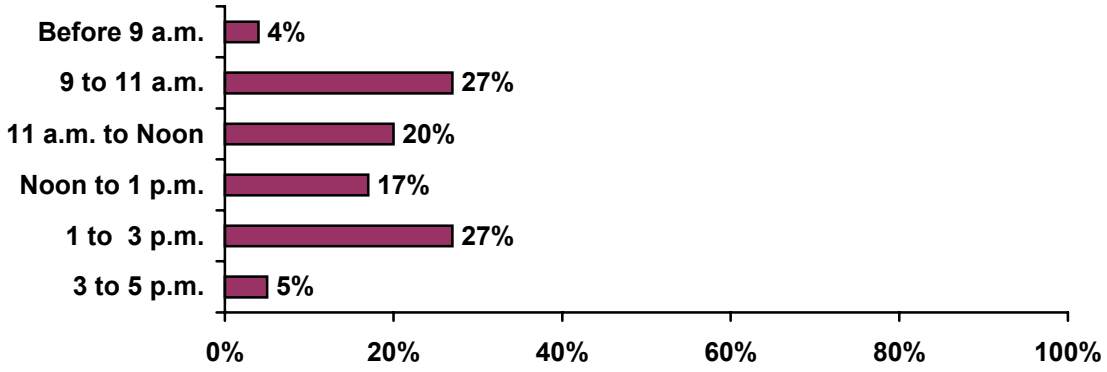
FIGURE 26: TOTAL AMOUNT OF TIME SPENT AT WATERFRONT
(BASE: All Respondents [n = 426])



Peak arrival times for all respondents are between 9 and 11 a.m. (27%) and 1 and 3 p.m. (27%).

A number of respondents also indicate they arrive at the Waterfront between 11 a.m. and Noon (20%).

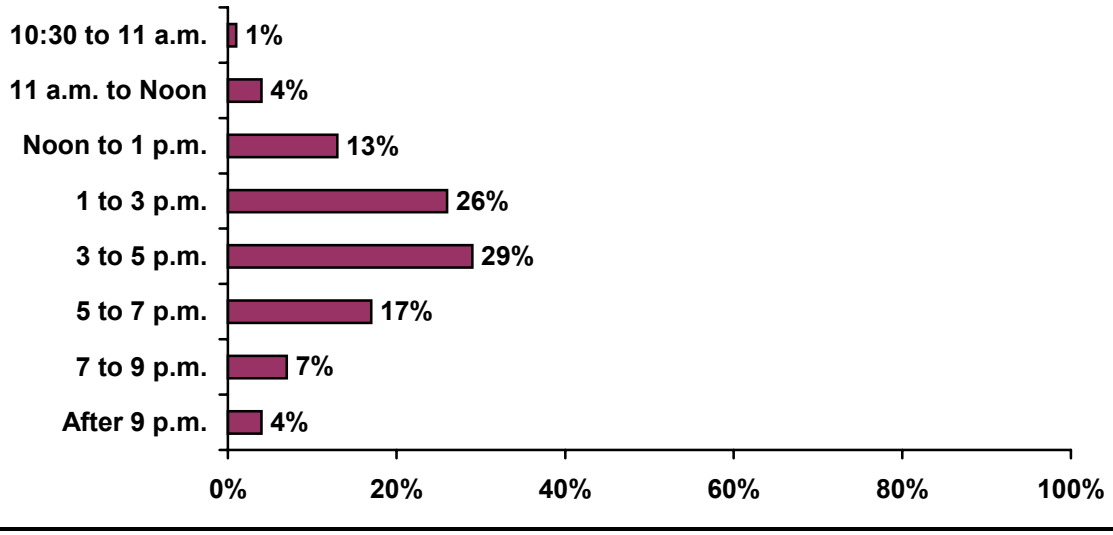
FIGURE 27: PEAK ARRIVAL TIMES AT WATERFRONT
(BASE: All Respondents [n = 426])



Peak departure times are between 1 and 3 p.m. (26%) and 3 to 5 p.m. (30%).

A number of respondents also indicate they depart the Waterfront between 5 and 7 p.m. (17%).

FIGURE 28: PEAK DEPARTURE TIMES FROM WATERFRONT
(BASE: All Respondents [n = 426])



Reasons for Visiting the Waterfront

All respondents were asked to indicate the reasons they were visiting the Waterfront on the day they completed the survey.

Slightly more than half (52%) of all respondents indicate they are visiting the Waterfront to sightsee.

An additional thirty-percent (30%) are at the Waterfront to visit the Waterfront itself, almost one-quarter (24%) visit the Waterfront to shop, twenty percent (20%) visit for dining purposes, an additional twelve percent (12%) visit for recreation purposes, nine percent (9%) visit for business purposes, eight percent (8%) visit to take a cruise, while five percent (5%) visit the ferry dock and four percent (4%) visit the aquarium.

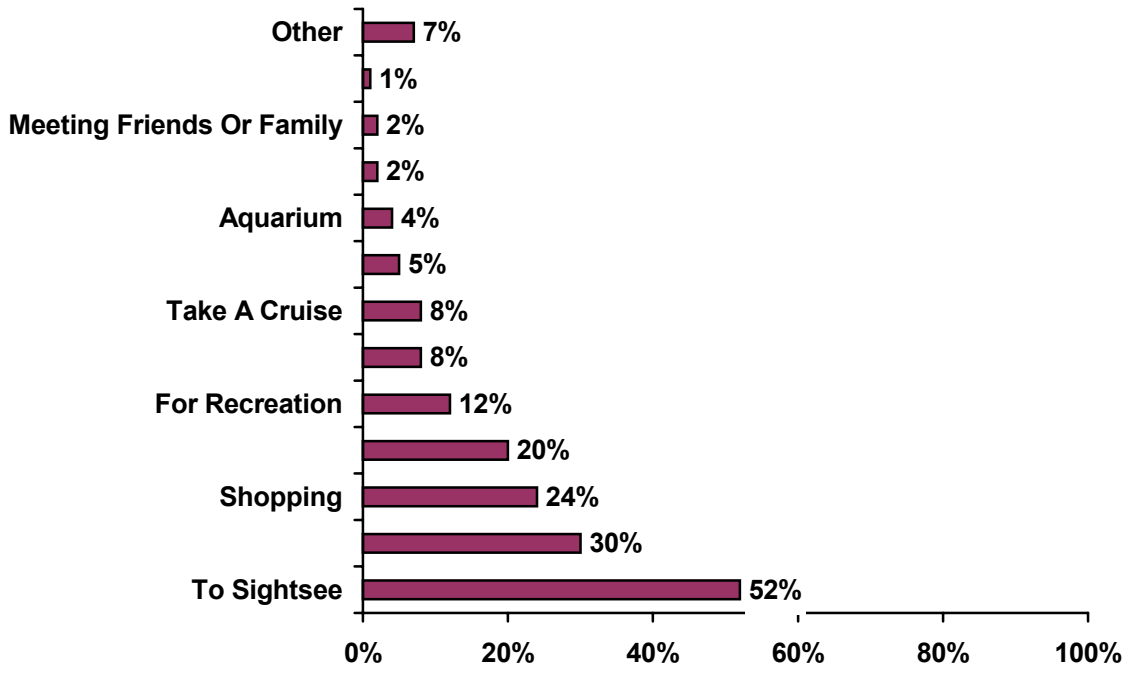
One-third (33%) of respondents who drive-alone to the Waterfront visit the Waterfront to sightsee, while an additional third (33%) visit for business purposes.

As might be expected, local residents are more likely than respondents visiting Seattle on vacation to indicate they are visiting the Waterfront for business purposes – 19% compared to 3%, respectively. Conversely, respondents visiting Seattle on vacation are more likely than local residents to indicate they are visiting the Waterfront to sightsee (64% compared to 32% residents), visit the Waterfront (36% compared to 21%), and to shop (27% compared to 18%).

Respondents with children in their travel party are more likely than those without to indicate they are at the Waterfront to sightsee (61% compared to 49%). Conversely, respondents without children in their travel party are more likely than those with children to indicate they are at the Waterfront for business reasons (10% compared to 2%).

Respondents who pre-pay for parking are more likely than those who choose meter parking to indicate they are visiting the Waterfront to sightsee (67% compared to 43%).

FIGURE 29: REASONS FOR VISITING WATERFRONT
(BASE: All Respondents [n = 426])



Waterfront Destinations

All respondents were asked to indicate their primary waterfront destination and to indicate the amount of time they spent at that destination.

Less than a third (27%) of all respondents indicate their primary destination was the Waterfront in general.

An additional fifteen percent (15%) indicate their primary destination as the Pike Place Market, fourteen percent (14%) indicate the aquarium as their primary destination, and four percent (4%) each indicate they were going to shops or stores along the Waterfront, while three percent (3%) indicate they were going to restaurants.

Carpoolers are significantly more likely than both bus riders and walkers to indicate their primary destination as the Pike Place Market – 20% compared to 9% and 8%, respectively.

Respondents with children are more likely than those without children to indicate the aquarium is their primary destination – 22% compare to 11%.

In general, respondents who indicate their primary destination was a specific restaurant (e.g. Ivar's, Elliot's) or restaurants in general spend less than 2 ½ hours at restaurants.

One-third (35%) of respondents who indicate their primary destination was the Waterfront spend up to 2 ½ hours on the Waterfront, while an additional third (33%) spend up to four hours at the Waterfront. Thirteen percent (13%) of

respondents who indicate their primary destination was the Waterfront spend more than 4 hours on the Waterfront.

Forty-five percent (45%) of respondents who indicate the Aquarium is their primary Waterfront destination indicate they spend 1 to 2 ½ hours at the Aquarium.

Over half (52%) of respondents who indicate Pike Place Market was their primary Waterfront destination indicate they spend up to 2 ½ hours there.

FIGURE 30: PRIMARY WATERFRONT DESTINATION
(BASE: All Respondents [n = 426])

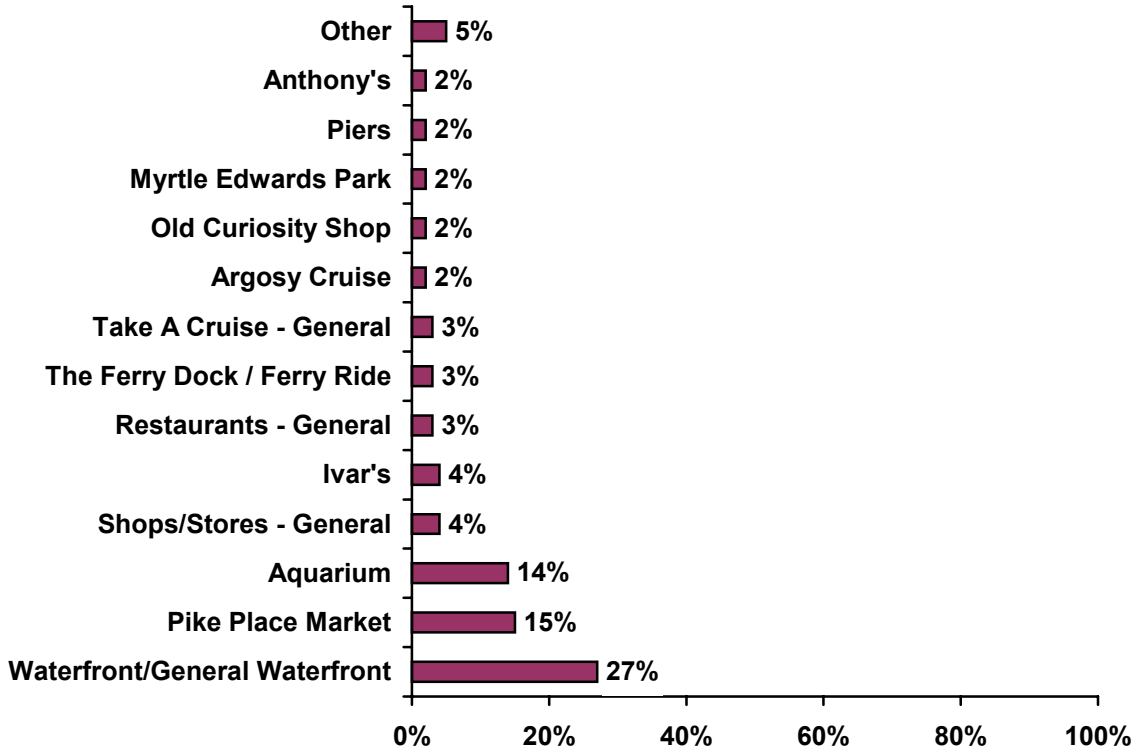
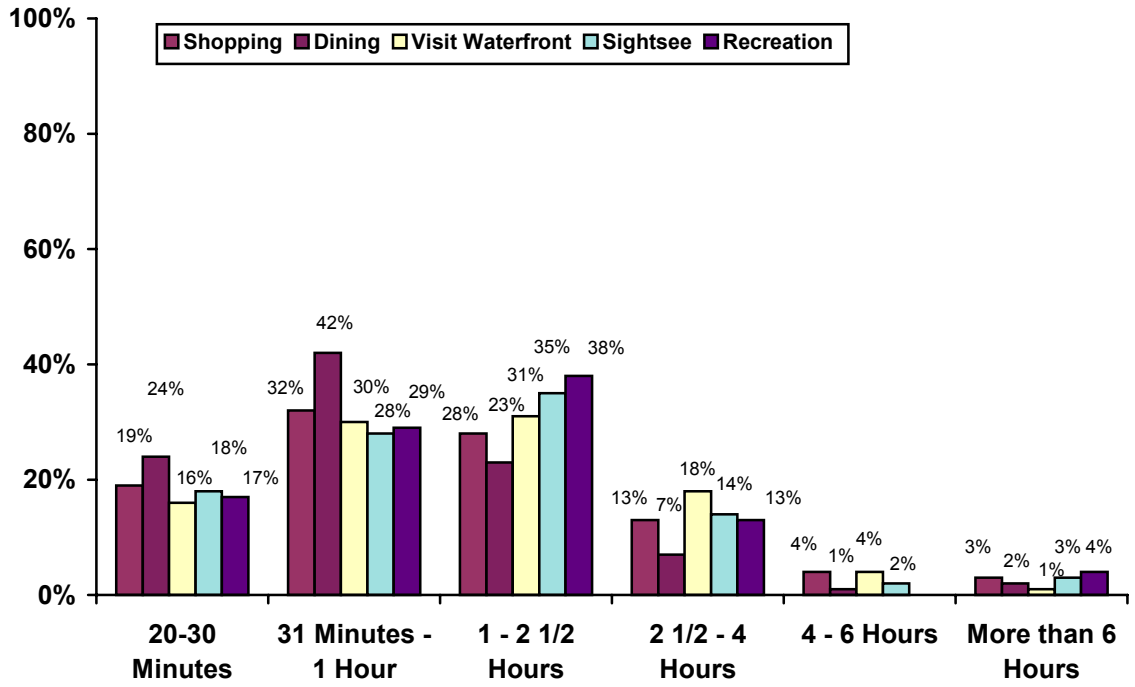


FIGURE 31: TIME SPENT AT FIRST DESTINATION BY VISIT PURPOSE
(BASE: All Respondents [n = 426])



Ten percent (10%) of all respondents who had a secondary Waterfront destination indicate their secondary destination was the Pike Place Market.

Nine percent (9%) indicate their secondary destination was the aquarium, while eight percent (8%) indicate their secondary destination was the Waterfront.

Forty-two percent (42%) of all respondents indicate they had no secondary destination.

FIGURE 32: SECONDARY WATERFRONT DESTINATION
(BASE: All Respondents [n = 426])

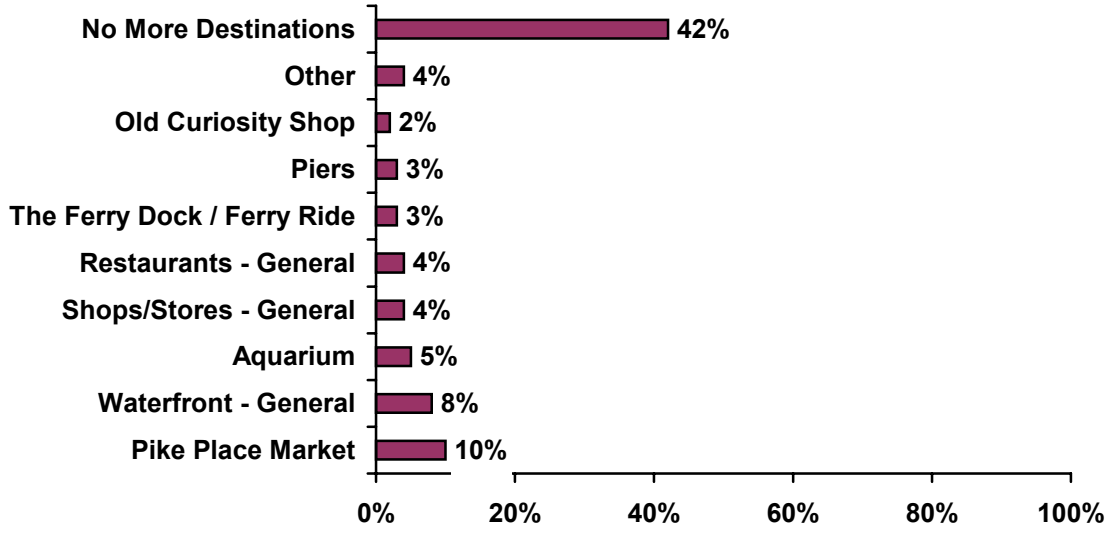
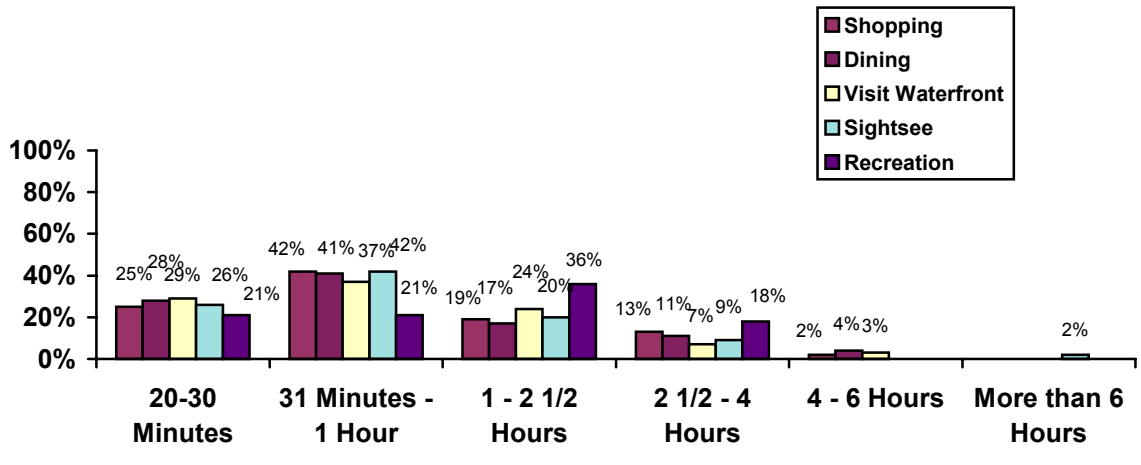


FIGURE 33: TIME SPENT AT SECOND DESTINATION BY VISIT PURPOSE
(BASE: All Respondents [n = 426])



The majority (81%) of respondents indicate they had no tertiary destination on the Waterfront.

FIGURE 34: THIRD WATERFRONT DESTINATION
(BASE: All Respondents [n = 426])

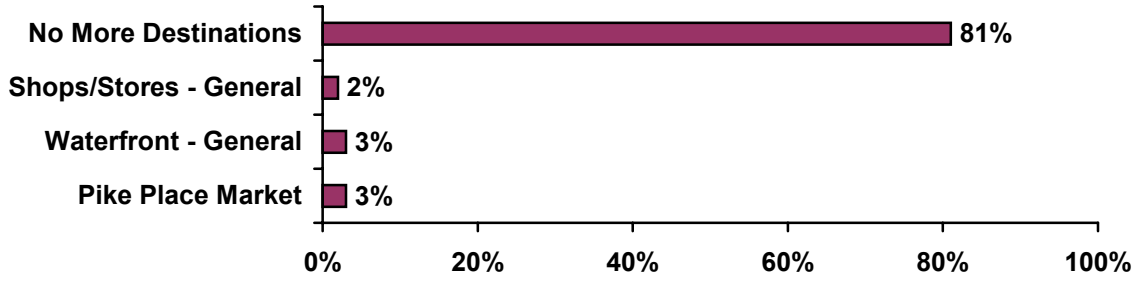
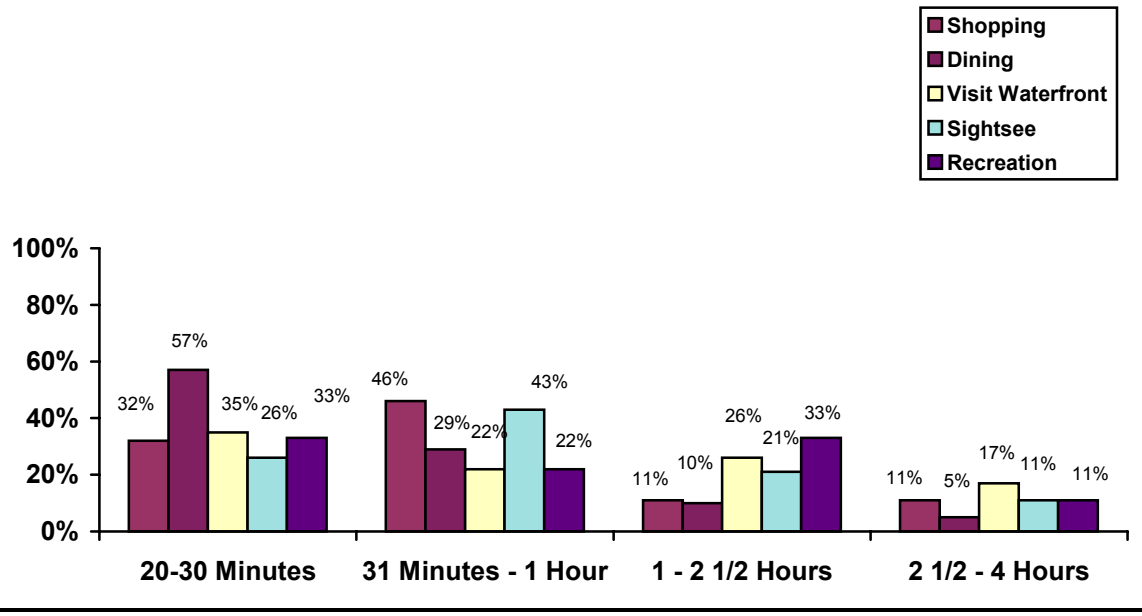


FIGURE 35: TIME SPENT AT THIRD DESTINATION BY VISIT PURPOSE
(BASE: All Respondents [n = 426])



Parking Behavior

Parking Zone

Each respondent who drove to the Waterfront was asked to indicate, utilizing a map marked with the parking zones for the study and outer Waterfront area, in which zone they had parked. For zones that encompass both the study area and an area outside the study area respondents were asked to indicate in which part of that zone they had parked. One quarter (25%) of all respondents who drove to the Waterfront parked in Zone 6.

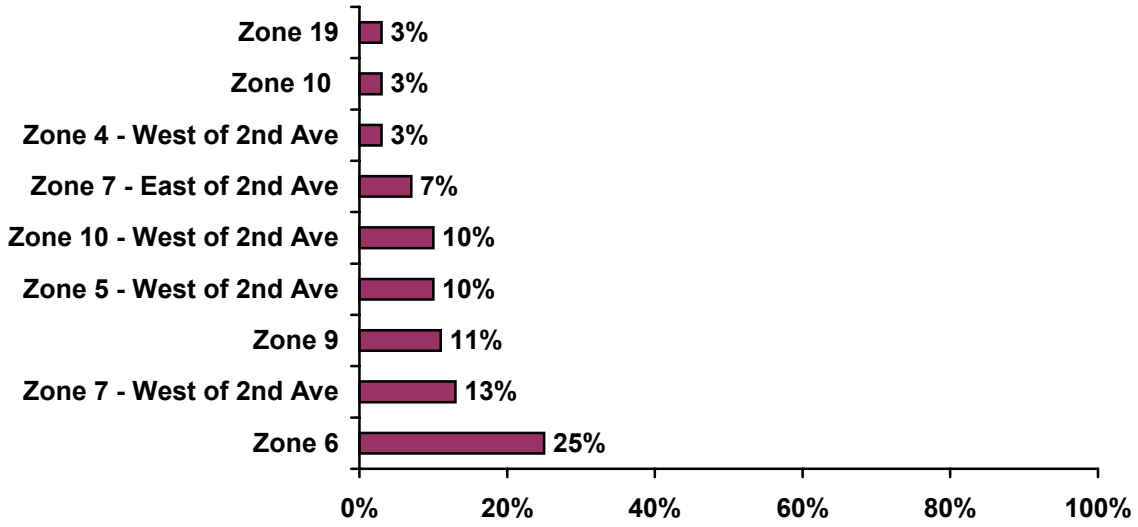
An additional Fourteen percent (14%) parked in Zone 7, west of 2nd Avenue and within the study area. Eleven percent (11%) of participants parked in Zone 9, as well as in Zone 10 – west of 2nd Avenue, while ten percent (10%) parked in Zone 5 – west of 2nd Avenue.

Sixteen percent (16%) of all respondents who drove to the Waterfront parked in zones located outside the immediate Waterfront study area.

Respondents who utilized meter parking are significantly more likely than those who indicate they paid after they parked to have parked in Zone 9.

Respondents who indicate they walked as part of their mode of getting to the Waterfront are significantly more likely than those who drove alone or carpooled to indicate they parked in Zone 9 – 60% compared to 14% and 10%, respectively.

FIGURE 36: PARKING ZONE
(BASE: Respondents Who Drove To Waterfront [n = 180])



Type of Parking Spot

Each respondent who drove to the Waterfront was asked to indicate the type of parking spot or lot in which they parked.

One-third (34%) of respondents parked in a metered parking spot.

An additional third (31%) parked in a lot in which they took a ticket on entrance and would pay after they were finished with their Waterfront visit.

Twenty-one percent (21%) indicate they parked in a pre-pay lot and seven percent (7%) indicate they parked in free parking on the street.

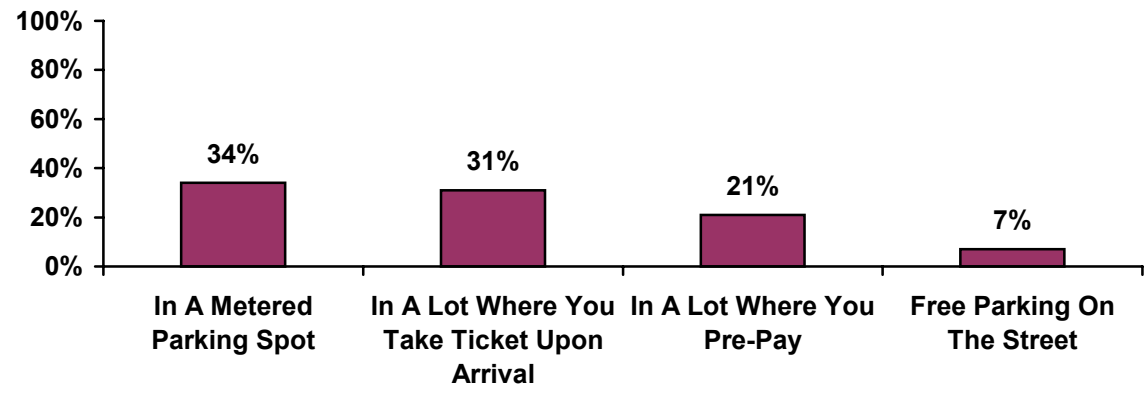
Half (52%) of all respondents who drove to the Waterfront and indicate their purpose is to dine at the Waterfront, park in a metered parking spot, as do forty-five percent (45%) of respondents who indicate shopping is their purpose in visiting the Waterfront.

Forty-three percent (43%) of all respondents who drove to the Waterfront and indicate their purpose is to visit the Waterfront park in a lot in which they took a ticket on entrance and would pay after they were finished with their Waterfront visit, as do thirty-four percent (34%) of respondents who report they are at the Waterfront to sightsee.

Respondents who have visited the Waterfront in the past are more likely than those who are first-time visitors to indicate they park in a metered spot – 41% compared to 22%. Conversely, respondents who are visiting the Waterfront for the first time are more likely than those who have been at the Waterfront more than once to indicate they parked in a pre-pay lot – 31% compared to 16%.

FIGURE 37: TYPE OF PARKING SPOT

(BASE: Respondents Who Drove To Waterfront [n = 180])



Amount Paid for Parking at Waterfront

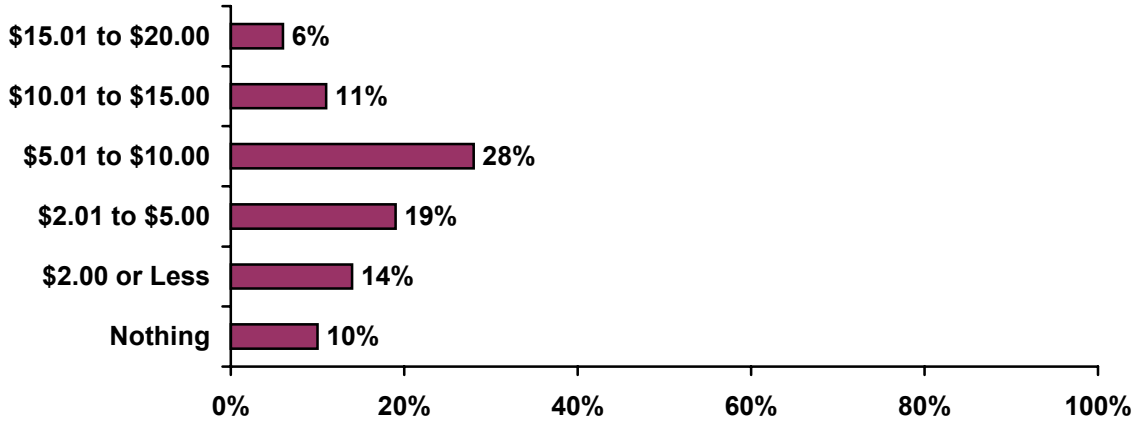
Each respondent who drove to the Waterfront was asked to indicate how much he or she had paid or would pay for parking.

On average, respondents indicate they did or will pay $6.50 for parking while at the Waterfront.

Eleven percent (11%) of all respondents who drove to the Waterfront indicate they will or have paid nothing for parking.

FIGURE 38: AMOUNT PAID (OR WILL PAY) FOR PARKING

(BASE: Respondents Who Drove To Waterfront [n = 180])



Respondents who indicate they parked at a meter indicate they will or have paid $3.25 for parking. Respondents who indicate they will pay after their visit indicate that on average they will pay $9.68 for their stay at the Waterfront, while those who pre-paid for their parking indicate they have paid an average of $8.70 for parking.

Respondents who drove alone to the Waterfront indicate they will or have paid $5.08 for parking at the Waterfront, while those who carpool indicate they have or will pay on average, over a dollar and a half more - $6.88.

Local residents pay almost two dollars - $1.90 – less for parking at the Waterfront than visitors - an average of $5.30 compare to $7.20.

Similarly, first-time visitors pay almost two and a half - $2.50 – dollars more for parking than repeat Waterfront visitors – an average of $8.20 compared to $5.70.

Respondents with children pay slightly more than those without children to park - $7.50 compared to $6.10.

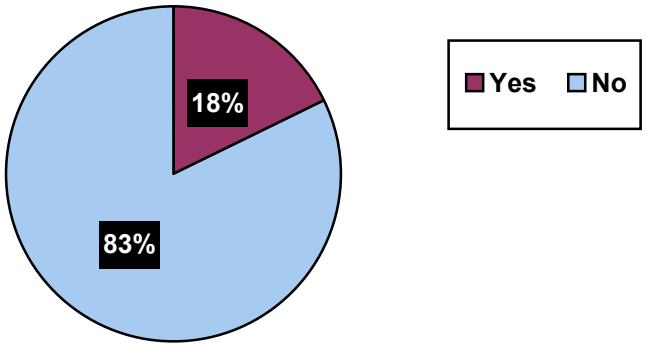
Respondents who drove to the Waterfront were also asked to indicate if their parking rate was an early bird rate or other special rate.

The majority (83%) of respondents did not pay an early bird or other special rate.

However, eighteen percent (18%) of respondents who drove to the Waterfront did pay an early bird or special rate for their parking.

Respondents 25 to 34 are more likely than both their younger and older counterparts to indicate they did pay an early bird or special rate for parking.

FIGURE 39: EARLY-BIRD OR SPECIAL RATE PARKING
(BASE: Respondents Who Drove To Waterfront [n = 180])



Respondents who drove to the Waterfront were asked to indicate how much time they spent looking for parking, how much time they expected to spend looking for parking, and how much time they are willing to spend looking for parking before they abandon the Waterfront as a destination.

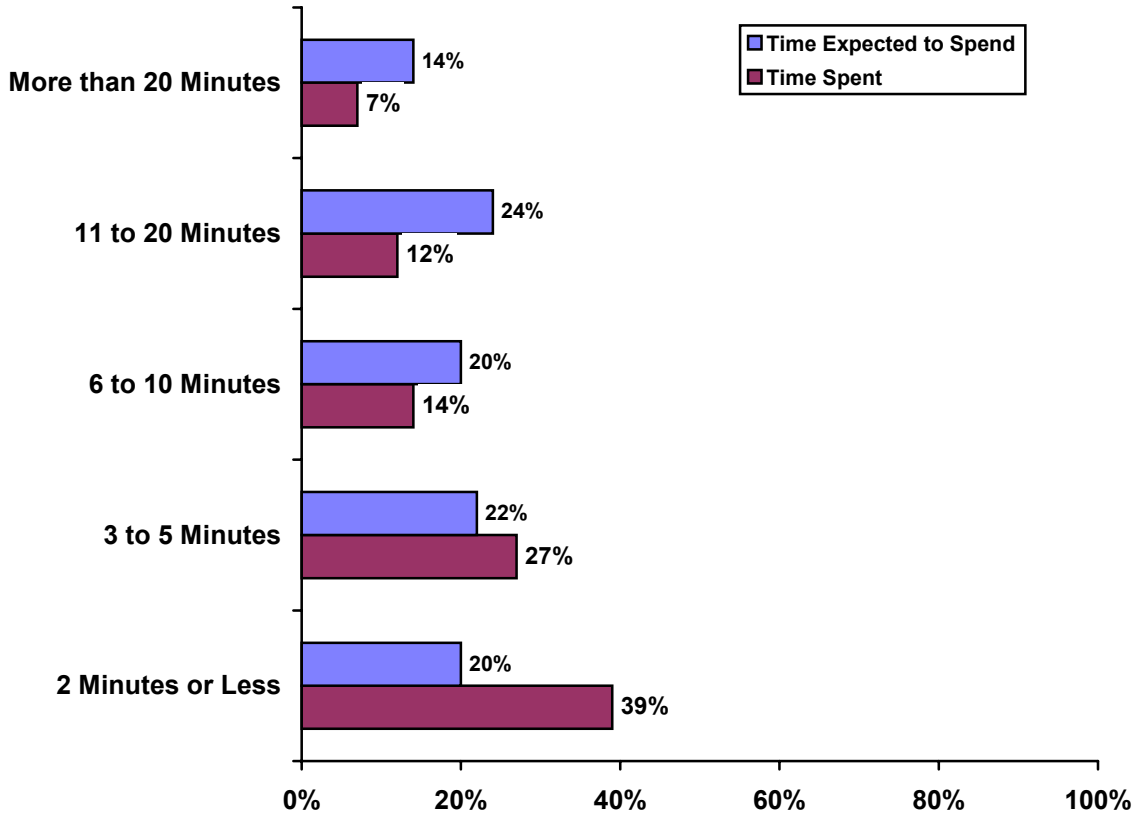
Overall, the amount of time respondents actually spent looking for parking matches or is less than their expectations of the amount of time they will look for parking when visiting the Waterfront.

On average, respondents spent almost 12 minutes looking for parking at the Waterfront. They expect to spend a similar amount of time – 12 minutes – looking for parking at the Waterfront.

Meter parkers spend significantly more time than those who park for free looking for parking – 7.7 minutes compared to 2.5 minutes, respectively. Meter parkers expect to spend an average of 14 ¼ minutes looking for parking, while those who park for free expect to spend 5 ½ minutes.

Respondents who are visiting the Waterfront for the first time spend significantly more time looking for parking than those who have been to the Waterfront in the past – 10.3 minutes compared to 6.2 minutes, respectively. Respondents who are visiting the Waterfront expect to spend 13 minutes looking for parking, while local residents expect to spend 11 minutes.

FIGURE 40: TIME SPENT / TIME EXPECTED TO SPEND LOOKING FOR PARKING
(BASE: Respondents Who Drove To Waterfront [n = 180])



Respondents are, on average, willing to spend up to 22 ½ minutes looking for parking.

Respondents who drive alone are willing to spend 18 minutes looking for parking, while carpoolers are willing to spend 24 minutes looking for parking.

Visitors to the Seattle-area are willing to spend significantly more time looking for parking than residents – 25 minutes compared to 18 minutes, respectively.

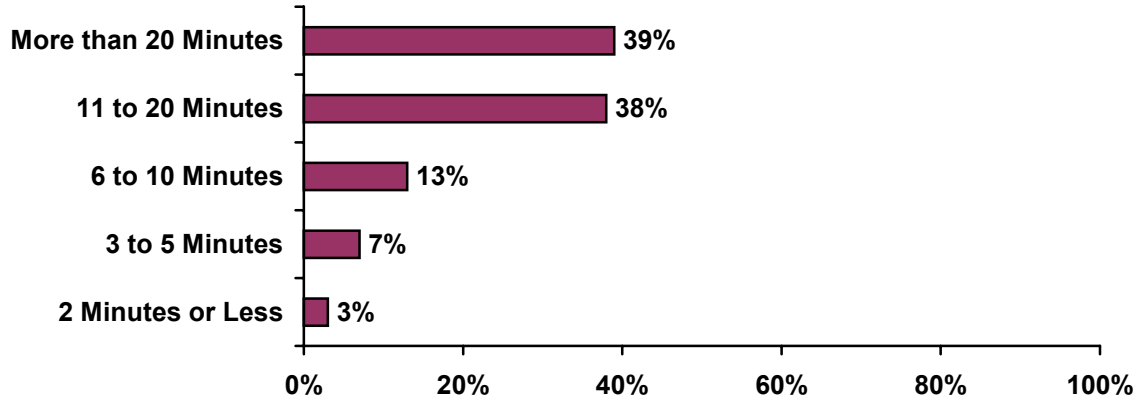
Respondents who are visiting the Waterfront for the purpose of taking a cruise are willing to spend up to 26 minutes looking for parking, while those who Waterfront visit purpose is to visit the Waterfront are willing to spend 29 minutes on average looking for parking.

Respondents who report they are visiting the Waterfront to shop are willing to spend almost 25 minutes looking for parking, while diners and those who plan to enjoy recreational activities at the Waterfront are willing to look for parking for and average of 19 minutes.

Respondents who parked for free at the Waterfront will look for parking for up to 16 minutes, while those who parked in a meter spot will look for parking for 21 minutes. Pre-pay parkers will look for parking for 24 minutes, and those who pay after they return from their Waterfront visit are willing to spend 22 minutes looking for parking.

Respondents without children in their travel party are willing to look for parking for two minutes more, on average, than those with children – 23 minutes compared to 21 minutes, respectively.

FIGURE 41: TIME WILLING TO SPEND LOOKING FOR PARKING
(BASE: Respondents Who Drove To Waterfront [n = 180])

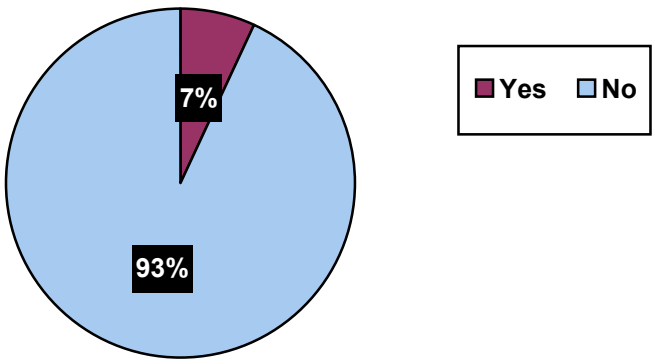


Respondents who drove to the Waterfront were also asked to indicate if they had called ahead, looked on-line, or used any other source to research parking options or directions prior to making their trip to the Waterfront.

The majority (93%) of respondents who drove to the Waterfront indicate they did not do any research regarding parking options prior to traveling to the Waterfront.

One-third (33%) of cruise ship passengers indicate they did call ahead, look on-line, or use another source to research parking options or directions prior to making their trip to the Waterfront.

FIGURE 42: RESEARCH PARKING OPTIONS?
(BASE: Respondents Who Drove To The Waterfront [n = 180])



Those respondents who did research parking options ahead of time indicate the main reason they did so was to know ahead of time where they were going to park.

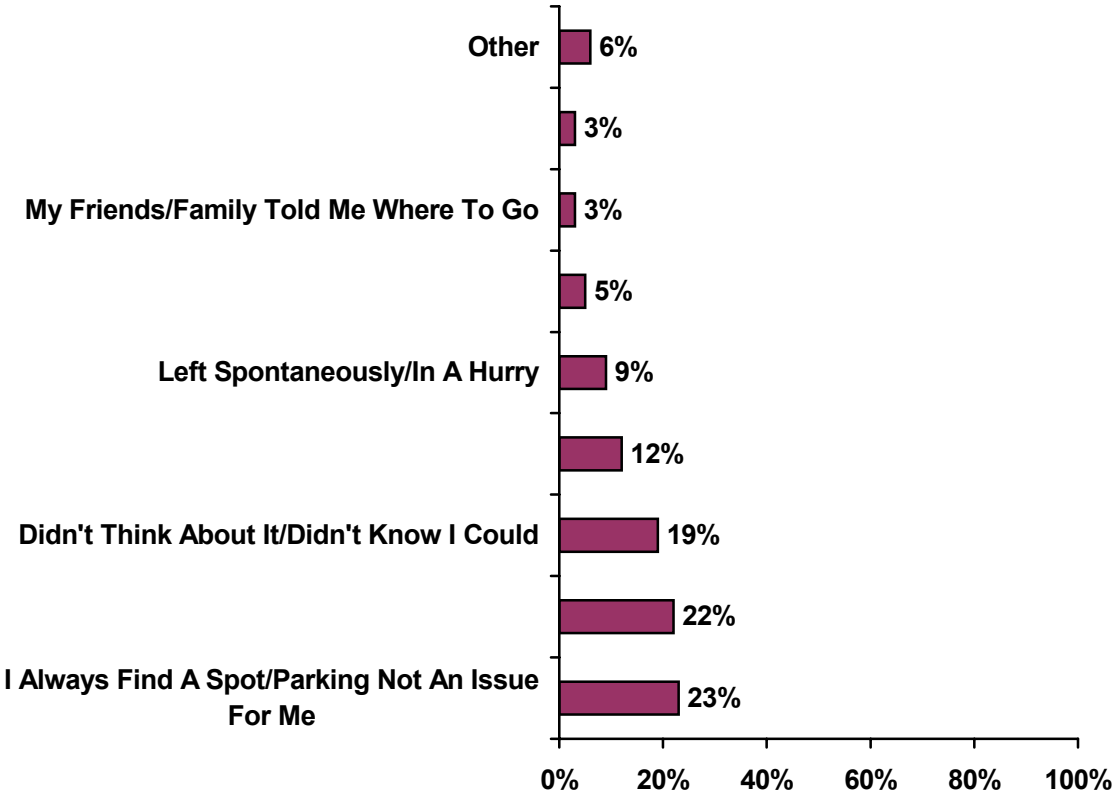
Although a small cell size, slightly more than one-third (36%) of respondents who researched parking options indicate they used an Internet website to research parking options ahead of time.

More than one-third (38%) of respondents who researched parking indicate they would have like to see general information about parking locations and prices when they researched parking information.

Respondents who researched parking options indicate they spent an average of 10 minutes research parking options.

When asked the main reason they did not research parking options ahead of time, those respondents who did not research parking options ahead of time indicate they know their way around Seattle and the Waterfront (27%), they didn't think of it or didn't know they could (19%), they always find a spot (17%), always park in the same place (12%), or left their origin in a hurry or spontaneously (10%).

FIGURE 43: REASON DID NOT RESEARCH PARKING OPTIONS
(BASE: Respondents Who Drove And Did Not Research Parking Options [n = 153])



All respondents who drove to the Waterfront were asked to indicate what the best way would be for the Waterfront to communicate parking options.

The best way the Waterfront could communicate parking options would be to improve signage and have a Waterfront web site with parking options listed.

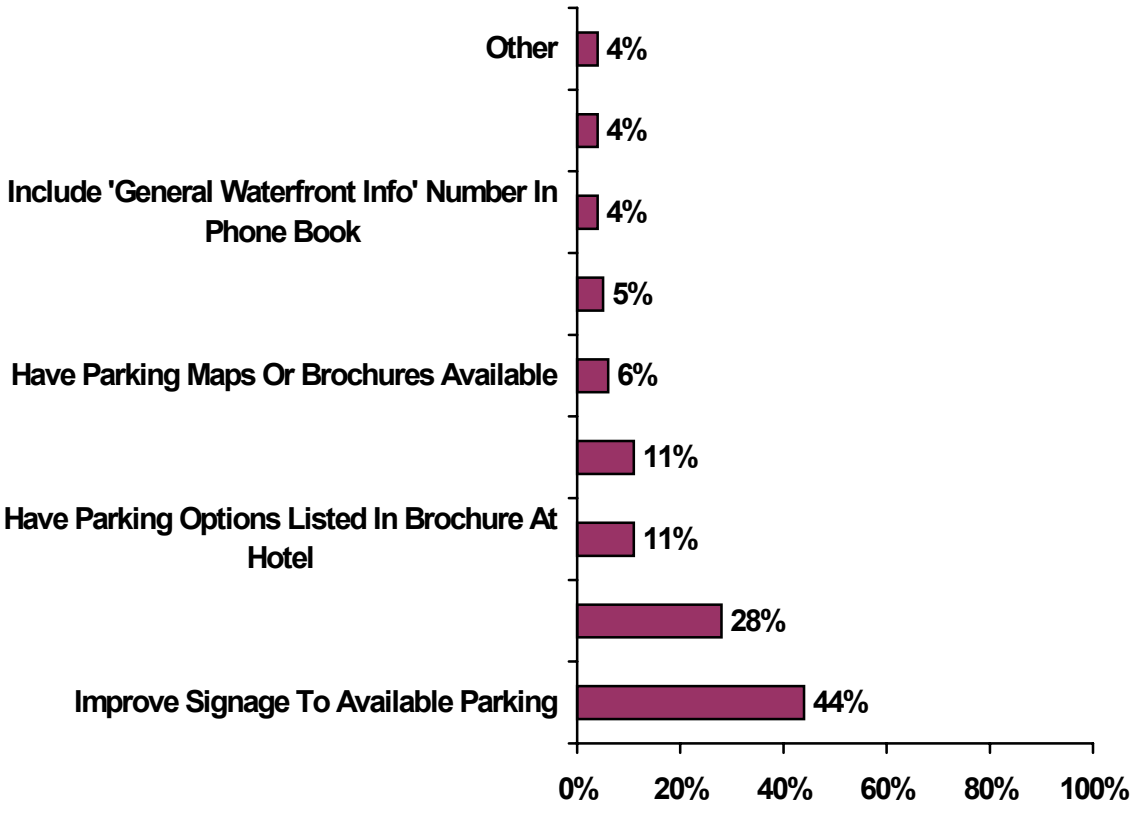
Forty-four percent (44%) of respondents indicate they would like the Waterfront to improve signage to available parking.

An additional twenty-eight percent (28%) indicate they would like to see a Waterfront web site with parking options listed.

An equal number (11%) indicate having parking options listed in a brochure at hotels would be helpful, as would television or radio announcements and newspaper ads.

Respondents who parked in a metered space indicate they would like to see improved signage – 61%.

FIGURE 44: BEST WAYS FOR WATERFRONT TO COMMUNCATE PARKING OPTIONS
(BASE: Respondents Who Drove To Waterfront [n = 180])



Respondents who drove to the Waterfront were asked to indicate the reasons they chose their final parking location.

Respondents choose parking locations because they are the first ones they see or are close to their end destination.

Forty-three percent (43%) of respondents who drove to the Waterfront indicate they chose their final parking location because it was the first one they saw.

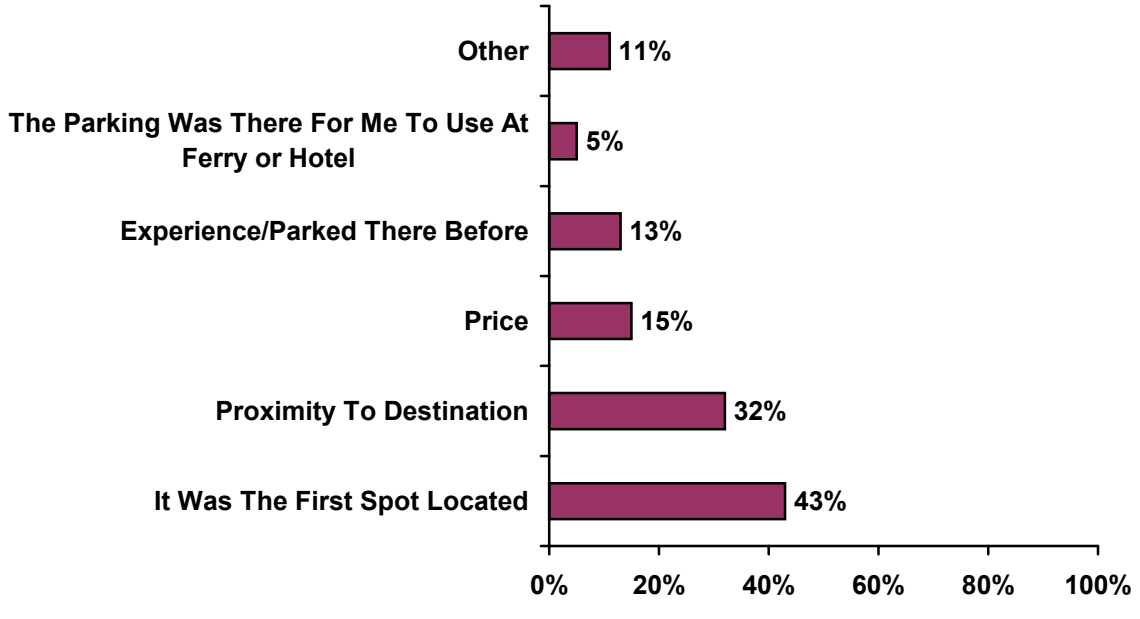
An additional third (32%) indicate they chose the location because of its proximity to their destination. Fifteen percent (15%) indicate they chose the location because of its price, while thirteen percent (13%) cite that they had parked there before as the reason they chose that location to park.

Carpoolers are significantly more likely than those who drive alone to the Waterfront to indicate they chose their final parking location because of its proximity to their destination – 38% compared to 15%.

Visitors from outside the Seattle area are significantly more likely than local residents to indicate they chose their parking spot because it was the first one they saw – 51% compared to 29%. Conversely, local residents are significantly more likely than visitors to indicate they chose their spot based on the past experience of parking there or that parking was already available to them at the hotel or ferry.

First-time Waterfront visitors are more likely than repeat visitors to indicate they chose their parking spot because it was close to their destination – 49% compared to 25%.

FIGURE 45: REASON FOR CHOOSING FINAL PARKING LOCATION
(BASE: Respondents Who Drove To Waterfront [n = 180])



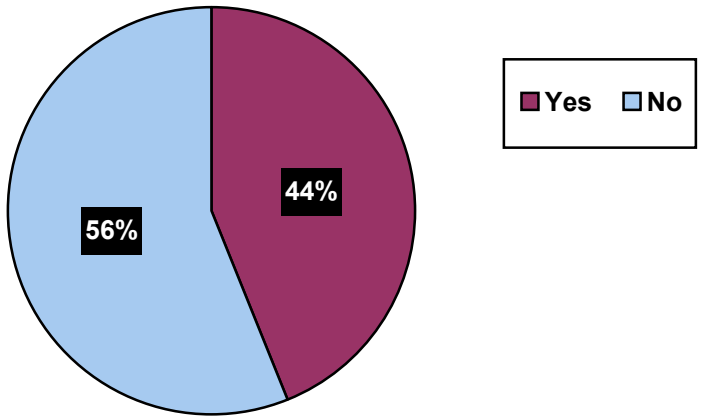
Respondents who drove to the Waterfront were asked to indicate if they had passed up any open spot or available lot before choosing their final parking location.

Slightly less than half (44%) of respondents indicate they did pass up an open parking spot prior to finally parking their car.

Respondents who visited the Waterfront in order to take a cruise are significantly more likely than those who are at the Waterfront to dine to indicate they passed an open spot prior to parking – 67% compared to 34%.

Respondents who paid after their Waterfront visit are more likely than those who paid for parking at a meter to indicate they did pass an open spot prior to parking – 59% compared to 34%.

FIGURE 46: PASS UP ON AVAILABLE PARKING SPOT?
(BASE: Respondents Who Drove To Waterfront [n = 180])



One-third (35%) of all respondents who drove to the Waterfront and passed up an open or available parking spot indicate they passed up the spot because it was too expensive.

Nineteen percent (19%) indicate they passed up a spot as it was too far from the Waterfront or their final destination, while twelve percent (12%) passed up a spot as they knew a better spot. Ten percent (10%) of respondents indicate they passed up a spot as the meter didn't offer enough time, and nine percent (9%) didn't see parking for the signage until they had passed by.

FIGURE 47: REASON FOR PASSING UP AVAILABLE LOCATION
(BASE: Respondents Who Passed Up An Open Or Available Parking Location [n = 70])

Parking Perceptions

All respondents were asked to indicate, using a five point scale where '1' is 'not at all important' and '5' is 'extremely important' the importance of nine parking attributes when choosing where to park on the Waterfront: cost of parking, proximity of parking to your Waterfront destination, easy access to your vehicle, the ability to come and go as you please from your parking location, covered parking, quickness of locating an available spot, access to parking (signage or directions to parking), the availability of parking (the number of parking locations and spaces), and ease of access to the Waterfront (having a hill climb or elevator to get to the Waterfront).

The attributes rated of most importance to respondents are availability of parking at the Waterfront (4.2), the quickness of locating a spot (4.1), and cost of parking (4.0).

Access to parking at the Waterfront (3.9) and easy access to your vehicle (3.8) were also rated highly in importance on the five-point scale.

Respondents rated covered parking, with a rating of 2.1, and ease of access to the Waterfront, 3.5, of least importance.

Respondent who carpool to the Waterfront rate 'easy access to your vehicle' significantly higher than drive alone visitors – 3.9 compared to 3.5, respectively.

As might be expected, respondents who choose to bus to get to the Waterfront rate the cost of parking highest in importance, 4.3 on the five-point scale.

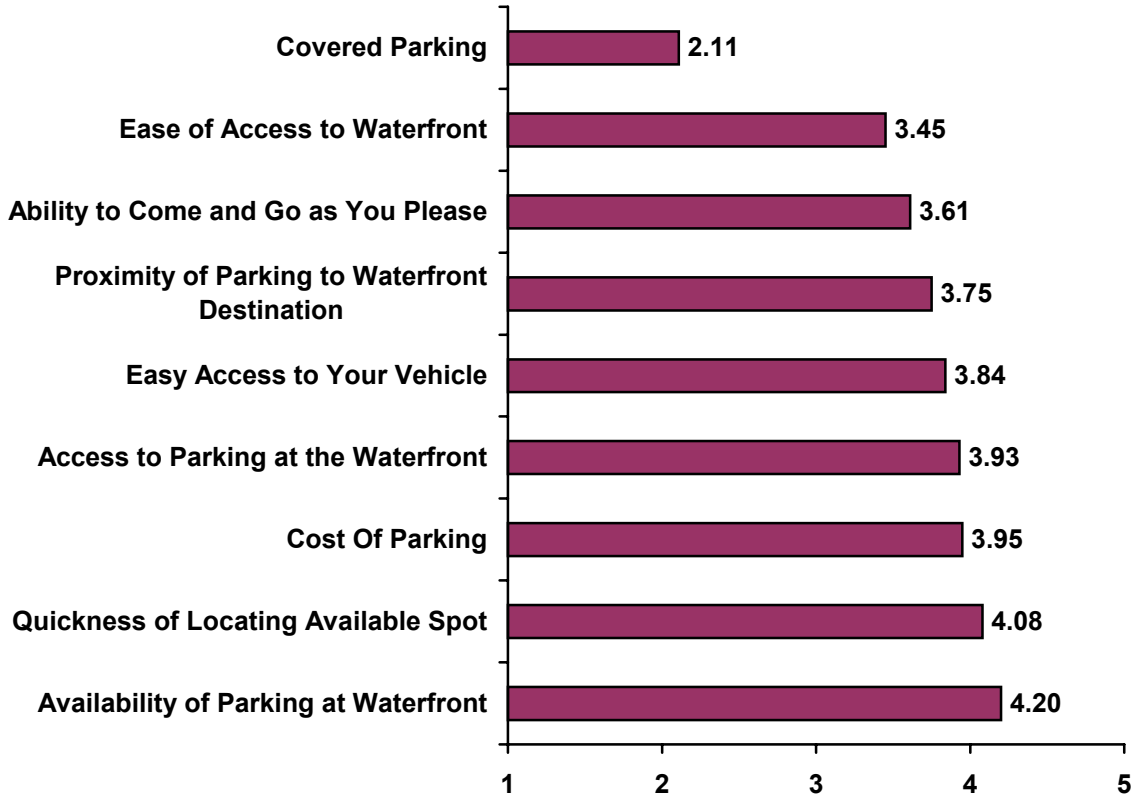
Local residents rate the availability of parking at the Waterfront (4.2), and cost of parking (4.1), highest in importance when choosing where to park when visiting the Waterfront, whereas respondents who are visiting the Waterfront on vacation or business, rate availability of parking at the Waterfront (4.2) and access to parking at the waterfront highest (4.2). While not rated as highly as other attributes, respondents visiting the Waterfront on vacation or business rate ease of access to the Waterfront significantly higher in importance than local residents – 3.6 compared to 3.3 on the five-point scale.

Respondents who visit the Waterfront for recreation purposes rate the quickness of locating an available spot (4.4), cost of parking (4.4), and access to parking (4.2) highest in importance

As might be expected, respondents who parked for free at the Waterfront indicate the cost of parking is the most important attribute – 4.6 on the five-point scale - in choosing where to park when visiting the Waterfront.

Respondents with children in their party rate the quickness of locating an available spot highest in importance (4.1), followed by access to parking at the Waterfront (4.0), and availability of parking (4.0).

FIGURE 48: PARKING ATTRIBUTE IMPORTANCE
(BASE: All Respondents [n = 426])



Future Use

Respondents were asked to indicate how likely - on a five point scale where '1' is 'very likely' and '5' is 'not at all likely' - they would be to park, or bus to a circulator bus that would travel between the Waterfront, Pioneer Square, the Central Business District, and the Seattle Center and take the Circulator the Waterfront.

Overall, respondents are very positive towards the idea of using a circulator bus to travel to the Waterfront.

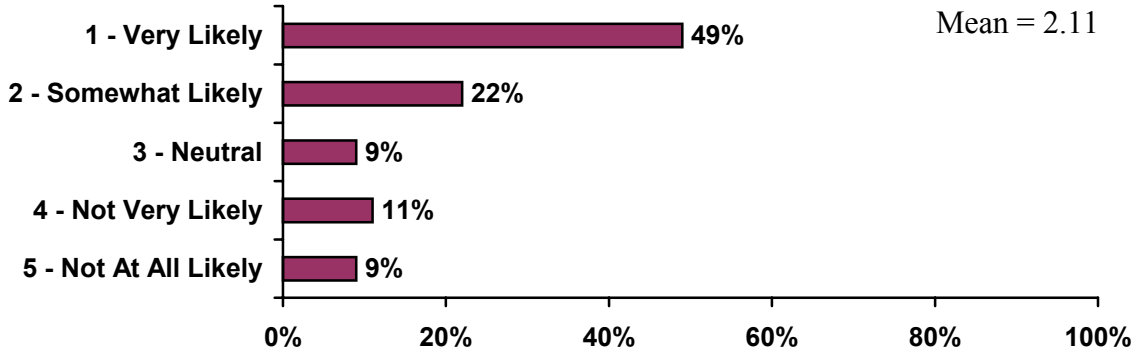
Almost half (49%) of all respondents indicate they would be very likely to park or bus to a circulator and take the circulator to the Waterfront.

Drive alone visitors and carpoolers are significantly more likely than visitors who accessed the Waterfront via other travel modes to indicate they are less likely to use a circulator – 32% and 26% not very or not at all likely.

Fifty-four percent (54%) of respondents who indicate they will pay for parking after their trip to the Waterfront indicate they are very likely to park or bus to a circulator and take

the circulator to the Waterfront – significantly higher than those who pay for meter parking – 34% very likely.

FIGURE 49: LIKELIHOOD TO USE A CIRCULATOR BUS
(BASE: All Respondents [n = 426])



All respondents were also asked to indicate what improvements to public transportation would need to be made along the Waterfront in order for them to consider using transit or using transit more often to travel to the Waterfront.

Almost one-third (28%) of respondents indicate that having more frequent buses scheduled, more buses, and improved access to buses would allow them to consider using transit or using it more often.

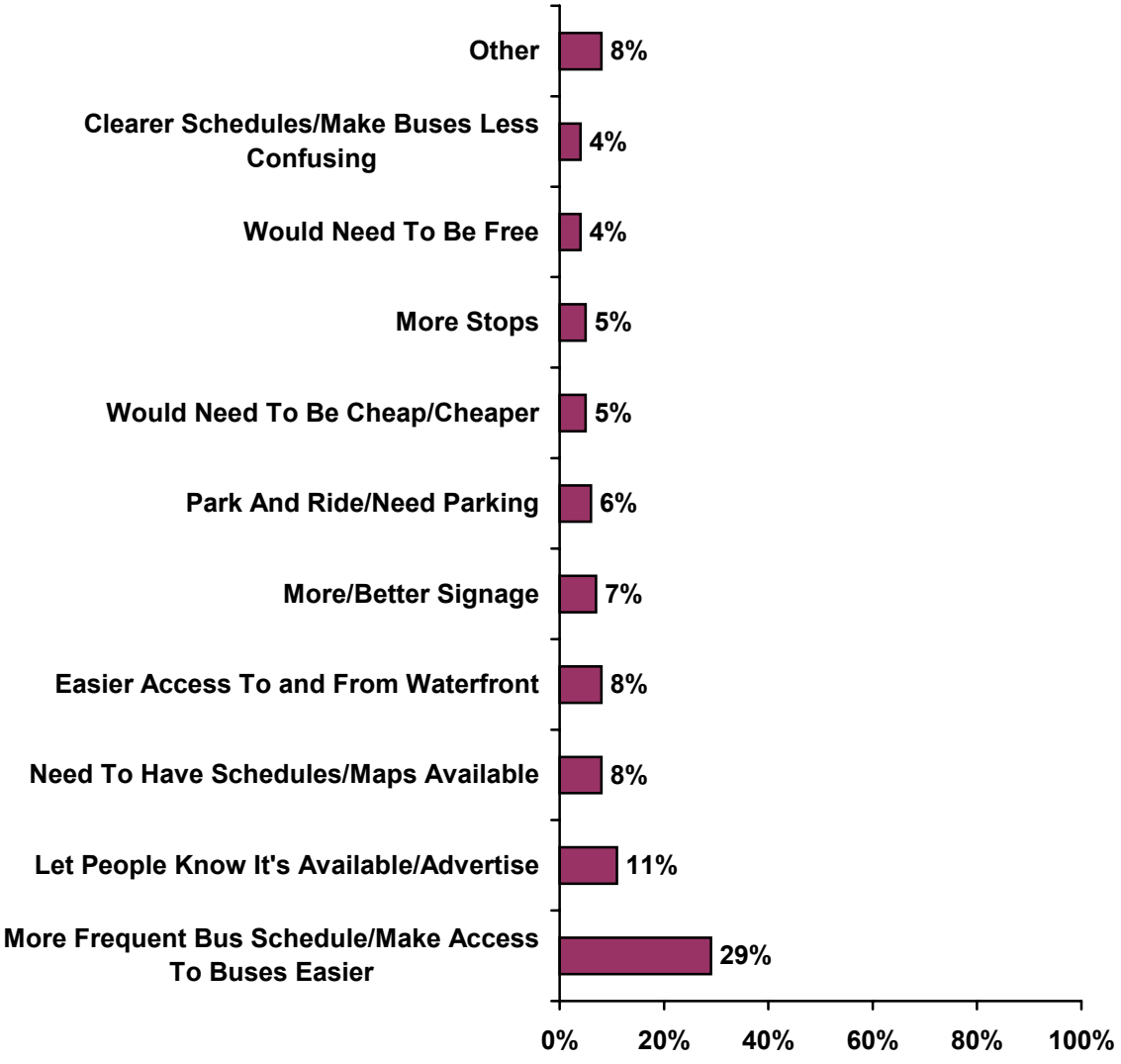
Additional suggestions include: letting people know that transit is available or advertising, having schedules and maps available, providing easier access via transit to and from the Waterfront, providing additional and improved signage, providing a park and ride, adding additional stops, adding a circulator bus, decreasing transit costs, providing clearer / less confusing schedules, providing free transit services, adding light rail or a monorail, providing a bus that comes from outside Seattle directly to the Waterfront and providing shuttles to the Waterfront.

Three percent (3%) of respondents indicate they would not use public transit.

Local residents are significantly more likely than respondents visiting Seattle for vacation or business purposes to indicate that having more frequent buses scheduled, more buses, and improved access to buses would allow them to consider using transit or using it more often – 38% compared to 21%.

Conversely, respondents visiting Seattle for vacation or business purposes are more likely than local residents to indicate that advertising and letting people know that transit is available would help them consider using transit or using transit more often to travel to the Waterfront – 15% compared to 1%. Respondents visiting Seattle for vacation or business purposes are also more likely than local residents to indicate that having transit schedules and maps available would be helpful (11% compared to 3%), as well as adding more and improving current transit signage (10% compared to 2%).

FIGURE 50: SUGGESTED IMPROVEMENTS FOR PUBLIC TRANSPORTATION ALONG THE WATERFRONT
(BASE: All Respondents [n =426])

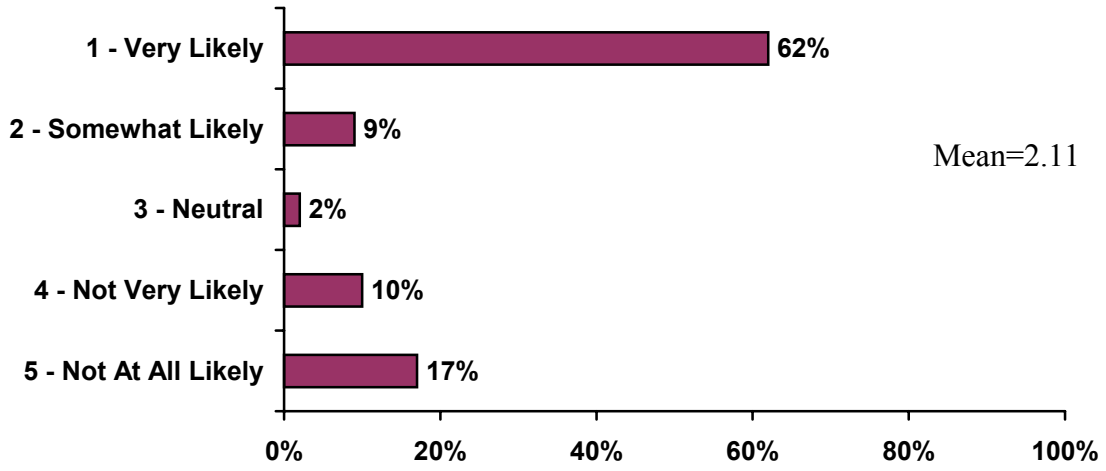


Using a five point scale where '1' is 'very likely' and '5' is 'not at all likely,' respondents were asked to indicate their likelihood to visit the Waterfront again in the next year.

Almost two-thirds (62%) of all respondents indicate they are very likely to visit the Waterfront again in the next year.

Nearly one-third (27%) of respondents indicate they are not very or not at all likely to visit the Waterfront again in the next year. As might be expected, these respondents are largely visitors who are visiting the Waterfront for vacation or business purposes (42%) or visitors for whom this is their first visit (51%).

FIGURE 51: LIKELIHOOD VISIT WATERFRONT AGAIN WITHIN NEXT YEAR
(BASE: All Respondents [n = 426])



All respondents were asked to indicate how likely - using a five point scale where '1' is 'very likely' and '5' is 'not at all likely' - they would be to travel to the Waterfront via three different methods or modes should they travel to the Waterfront again in the future. The modes measured were: drive and park at the Waterfront, take the bus to the Waterfront, and take a shuttle or taxi to the Waterfront.

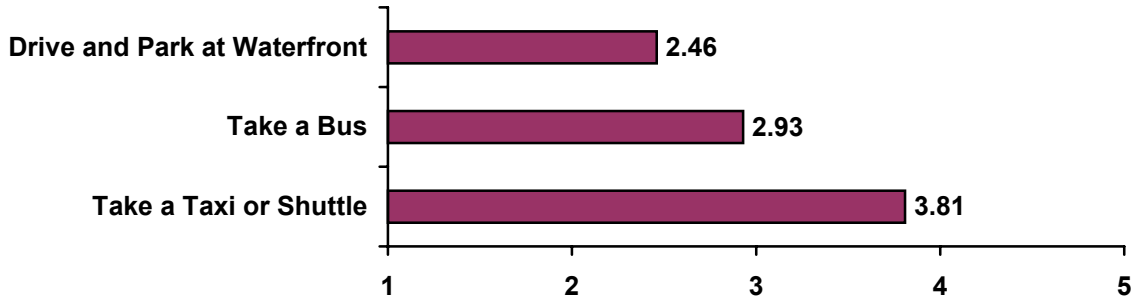
On the whole, respondents are much more likely to drive and park at the Waterfront – average rating on the five-point scale of 2.5 – than to take a shuttle or taxi to the Waterfront – average rating on the five point scale of 3.8.

Rated just over the mid-point (2.9) on the five-point scale, respondents are neutral in their likelihood to take a bus to the Waterfront.

Local residents are significantly less likely than those visiting Seattle for vacation or business purposes to indicate they would take a shuttle or taxi to the Waterfront (4.1 compared to 3.6). Local residents are significantly less likely than those visiting Seattle for vacation or business purposes to indicate they would drive and park at the Waterfront (2.2 compared to 2.6).

Respondents with children are significantly more likely than those without to indicate they are likely to drive and park at the Waterfront – average rating of 2.0 compared to 2.6.

FIGURE 52: LIKELIHOOD TO USE ALTERNATIVE MODES OF TRAVEL TO WATERFRONT
(BASE: All Respondents [n = 426])



In addition, respondents were asked, again using a five point scale where '1' is 'very likely' and '5' is 'not at all likely,' to indicate their likelihood of using off-site daily parking at two locations and valet parking at the Waterfront.

Respondents are most likely to drive, park at the Seattle Center and ride a shuttle to the Waterfront that costs from $0 to $2.00 and not at all likely to use valet parking on the Waterfront if offered for $10 to $15 for up to four hours.

Rated a 2.8 on the five-point likelihood scale, respondents indicate they are neutral to somewhat likely to drive, park at the Seattle Center and ride a shuttle to the Waterfront that costs from $0 to $2.00.

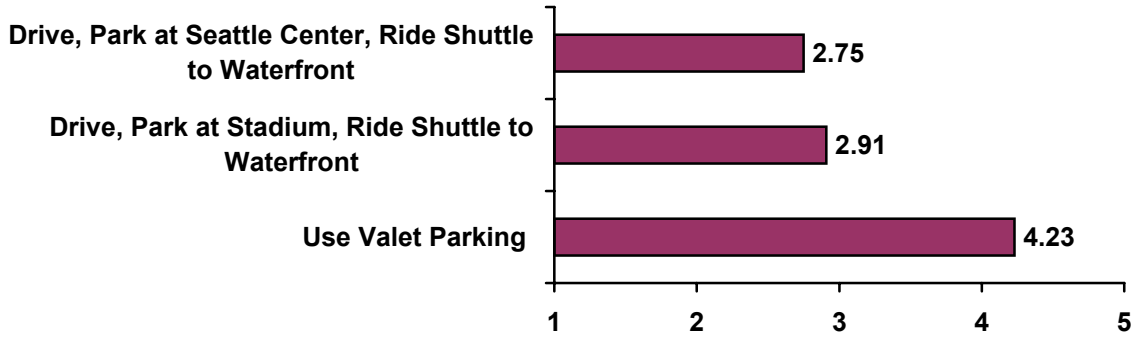
Rated a 2.9 on the five-point likelihood scale, respondents are neutral in their likelihood to drive, park at the Stadium, and ride a shuttle to the Waterfront that costs from $0 to $2.00.

Rated a 4.2 on the five-point likelihood scale, respondents are not very likely to use valet parking at the Waterfront if it were offered for $10 to $15 for up to 4 hours.

Local residents are significantly less likely than those visiting Seattle for vacation or business purposes to indicate they would use valet parking at the Waterfront (average rating of 4.5 compared to 4.0 on the five-point scale).

Respondents who drove alone or carpooled to the Waterfront indicate they are somewhat likely to drive, park at the Seattle Center and ride a shuttle to the Waterfront that costs from $0 to $2.00.

FIGURE 53: LIKELIHOOD TO USE ALTERNATIVE MODES OF TRAVEL TO WATERFRONT
(BASE: All Respondents [n = 426])



Respondents were also asked to indicate how much parking would have to cost before they would no longer visit the Waterfront and how much parking at the Waterfront would have to cost before they would use a travel mode other than a car.

Almost half of all respondents (45%) indicate parking would have to cost more than $25.00 before they would not visit the Waterfront. Half (53%) of all respondents indicate parking would have to cost more than $25.00 before they would use a travel mode other than a car.

When comparing average parking costs - overall, responses to both questions were similar – respondents on average indicate they would pay no more than $10.00 for parking before they would choose not to visit the Waterfront and before they would use a travel mode other than a car.

Carpoolers are willing to pay significantly more for parking than respondents who did not drive to the Waterfront. On average, carpoolers are willing to pay $13.00 for parking before they would choose not to visit the Waterfront. Carpoolers indicate parking would have to cost $12.00 before they would use a travel mode other than a car.

First-time Waterfront visitors are willing to pay significantly more for parking than repeat visitors before they would choose not to visit the Waterfront - $12.00 compared to $10.00 on average.

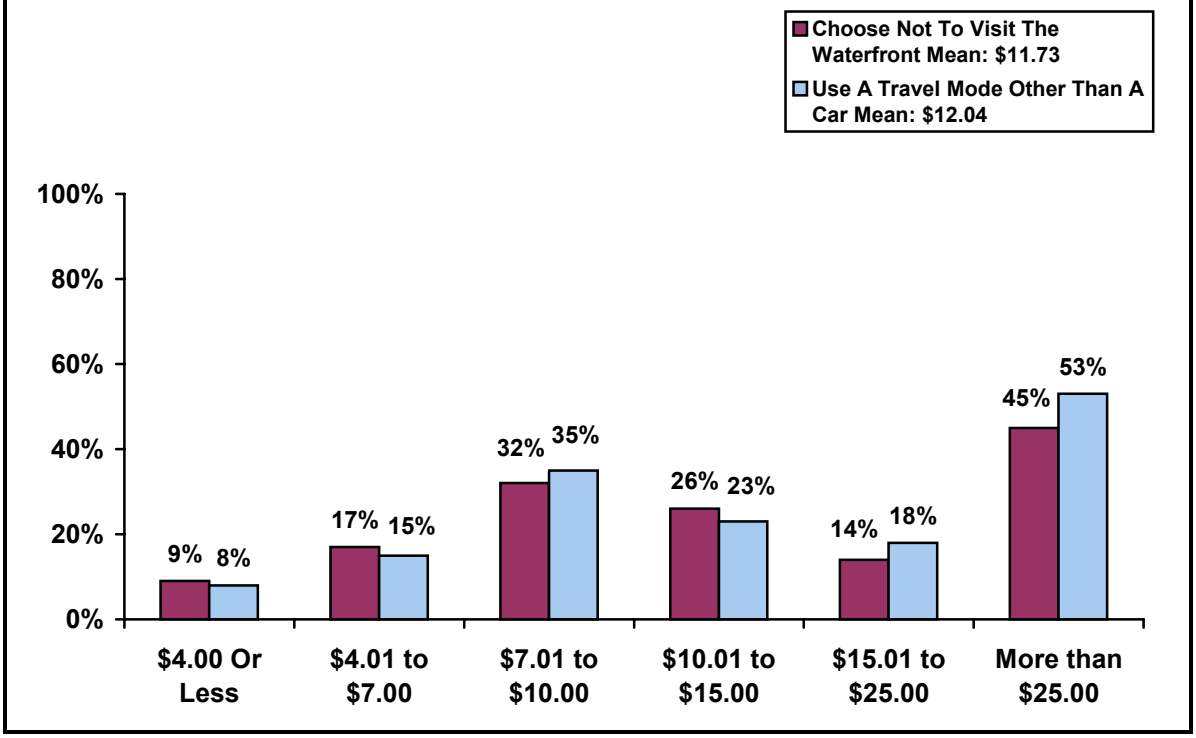
Respondents who visit the Waterfront to go shopping are willing to pay significantly more for parking before they would choose not to visit the Waterfront than respondents who indicate they visit the Waterfront for recreational purposes – on average $12.00 compared to $8.00, respectively. Respondents who visit the Waterfront to go shopping are willing to pay up to $13.80 for parking before they would use a travel mode other than a car.

Respondents who use meter parking would pay up to $8.00 before they would choose not to visit the Waterfront, while those who park for free would pay $10.00, and those who pre-paid as well as those who paid after they left the Waterfront are willing to pay up to $15.00 before they would choose not to visit the Waterfront. For respondents who paid

for parking either before or after their Waterfront visit, parking would have to cost $15.00 before they would use a travel mode other than a car.

FIGURE 54: MAXIMUM PRICES OF PARKING BEFORE CHANGING TRAVEL PATTERN

(BASE: All Respondents [n = 426])



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Parking Strategies

Strategy Development

Strategy development began by creating a generic list of potential strategies that could be applicable to Waterfront conditions. This generic list of strategies contained the following elements:

1. **Increase Parking Supply**
    a. Establish code requirements to allow for the replacement of existing short-term parking supplies on sites proposed for re-development.
    b. Create code requirements that address shared parking options.
    c. Provide development incentives (e.g., increased FAR) to construct additional short-term parking with new development.
    d. Increase on-street parking as part of new construction.
    e. Subsidize construction or price of off-street parking.
    f. Access remote parking supplies with a shuttle service.
    g. Redesign existing facilities to increase supply.
    h. Construct new public parking supplies.

2. **Use Existing Parking Supplies More Efficiently**
    a. Provide information to users (internet).
    b. Encourage use of fringe parking.
    c. Regulate pricing and enforcement of parking more effectively to encourage short-term use.
    d. Provide pedestrian improvements and signage programs to create links with underutilized supplies. (wayfinding and urban design improvements)
    e. Share parking (residential/commercial)
    f. Develop valet parking opportunities.
    g. Establish a parking brokerage service to make the best use of existing supplies.
    h. Develop seasonal parking plan to respond to peak summer weekday demands.

3. **Reduce Long-Term Parking Demand to Increase Short-Term Supply**
    a. Pricing strategies to discourage long-term and encourage short-term parkers.
    b. Market commute alternatives for employees and travel alternatives for tourist and recreational visitors to the Waterfront.

4. **Improve Transit access and service to the Waterfront.**
    a. Pricing - Extend free ride zone to the Waterfront.
    b. Access – Establish local circulator.
    c. Service – Improve routing of existing Route # 16 and/or 97.
    d. Access – Improve integrate trolley into Waterfront transportation system.

e. Tour Bus Access/Parking – Provide locations for tour/school buses to drop-off/pick-up passengers at major destinations (e.g., Victoria Clipper, Aquarium) and provide remote areas for bus parking while waiting for passengers.

5. **Manage On-Street Parking during Major Construction Projects.**
   a. Secure off-site parking during times when parking along Alaskan Way or under the Viaduct would be displaced for major construction.
   b. Provide shuttle service to remote parking locations.
   c. Provide information to tourists and other visitors about alternative parking locations.

Selected Strategies

The Project Advisory Team reviewed the generic list of strategies and refined them into a set of selected strategies that focused on improving pedestrian and transit connections, establishing a method to coordinate and manage parking supplies, and lastly to evaluate sites for new parking supplies. As an intermediate step in identifying potential strategies a matrix was prepared to compare the capitol intensive, operationally focused, and politically based strategies. This matrix is located in Appendix C. The prioritized strategies are in bold print and the strategies that were not pursued further are in italics. Some of the italicized strategies, especially those in the political column, could be pursued within the Strategic Planning Office as part of City wide policy refinements but were not considered to be an effective strategy for just the Waterfront.

The following list of strategies was identified for further exploration and refinement.

Pedestrian Connections

- Improve Signage/Wayfinding to Bell Street, Pike Hillclimb & Harbor Steps -From Both Downtown and Waterfront
- Pursue North Waterfront Access Project Recommendations for Drop-Off Zone & Clay Street Pedestrian Bridge
- Integrate with Marketing Programs

Transit Connections

- Modified Metro Rt. 97 (Partnership Route)
  - ✓ Consider Additional Stops on Waterfront and in Retail Core
  - ✓ Route Options: Alaskan Way with U-Turn at Broad
  - ✓ Elliott/Western Loop Route
  - ✓ Additional Partners to Increase Operating Subsidy
- Waterfront Streetcar
  - ✓ Service Improvements & Extension for Convenient Links to Parking North & South

Parking Management & Coordination

- Establish a Parking Management Entity to Coordinate:
  - ✓ Pricing Strategies—Encouraging 0-4 Hr Parking at Participating Facilities
  - ✓ Marketing Program
  - ✓ Signage/Wayfinding Program (coordinated with Downtown Wayfinding, Improve identification of primary vehicle routes to parking facilities)
  - ✓ Transit Partnership.

- Management Options
  - ✓ New MID Function
  - ✓ New Non-Profit
  - ✓ New PDA or New Function of Existing PDA
  - ✓ Agreement between Key Partners (E.g., Port, Market PDA, SEAS)

New Facilities

- Key Site Opportunities:
  - ✓ Spring & Western Block
  - ✓ PC-1 Site @ Pike Place Market
  - ✓ Olympic Sculpture Park

- Feasibility Considerations
  - ✓ Cost Effectiveness/Subsidy Requirement
  - ✓ Proximity & Accessibility to Destinations
  - ✓ Compatibility with Development Plans for Site

Strategy Refinement

Pedestrian Connections

Pedestrian access to waterfront destinations is subject to several challenges. At Alaskan Way, these include steep grades, the Alaskan Way Viaduct, the mainline railroad, complexity of crossing vehicle travel lanes, the bicycle/running trail and the streetcar line. There are additional challenges on the upland side of the waterfront connection, including crossing busy traffic lanes on Elliott and Western avenues that connect to SR 99, and the Viaduct's visual obstruction of access at the Lenora and Bell Street pedestrian bridges.

Pedestrian routes need to be clear, identifiable, safe appearing, convenient and interesting. Some of the considerations are functional, involving easily walk able grades, good drainage, stairs with landings, and, where possible, mechanical assists. Compliance with ADA requirements is, of course, essential. The ability to find your way is largely dependent upon good signing, but is enhanced by the use of consistent materials, the visibility of destinations and the clarity of the route. Appearance is also important.

Attractive pedestrian routes invite use. Protection from wind and rain, and access to the sun can also make a pedestrian connection more attractive. Adjacent land uses and activities may be the most important. Routes that pass by retail, outdoor cafes, vendors and places where people gather are both safer and more interesting. Good pedestrian routes also involve pleasant outlooks, viewpoints and resting places.

Pedestrian facilities could be improved in a variety of ways to address these challenges. Figure 55 provides a summary of key opportunities to improve pedestrian connections to the parking supply. Some examples include streetscape improvements that clarify pedestrian zones and routes (see Figure 56 from the Center City Open Space Strategy and Figure 57 from the North Waterfront Access Project) and grade separated pedestrian connections. Some features of the pedestrian environment would be dramatically altered by any of the conceptual alternatives for replacement of the Alaskan Way Viaduct. Those conceptual alternatives address several of the challenges. Investments in improved pedestrian connections at Alaskan Way will likely be limited, in the near-term, to those that (a) would not be directly affected by the preferred alternative for Viaduct replacement or (b) are relatively low-cost and high-impact, justifying an investment with a short useful life.

Figure 55: Opportunities to Improve Pedestrian Connections

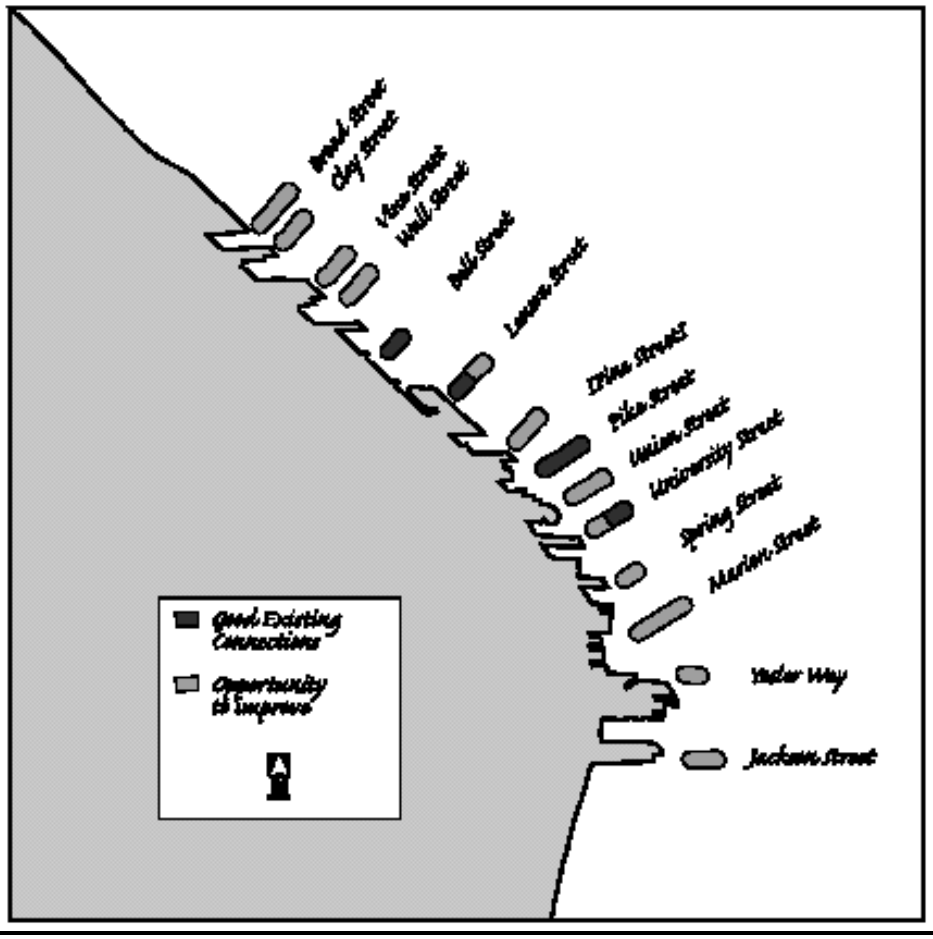
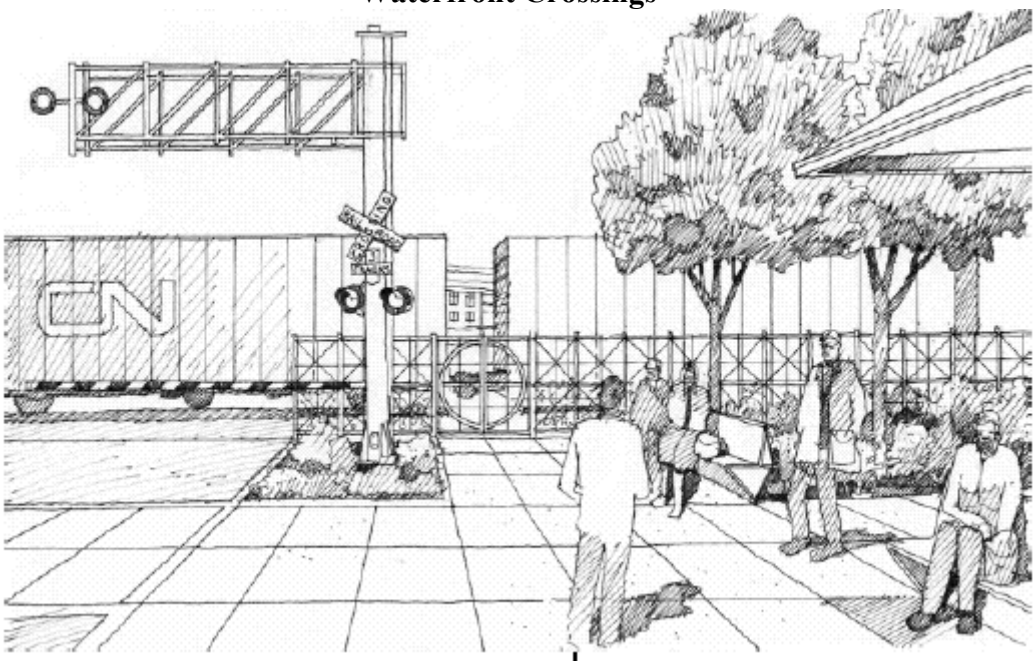
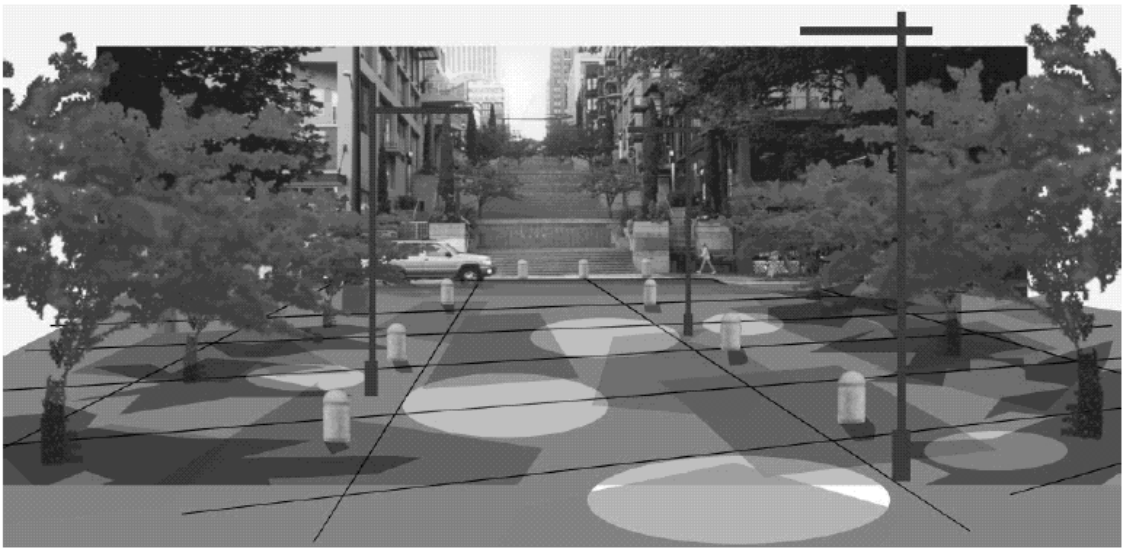


Figure 56: Classified Zones for Pedestrians Would Improve Safety at Difficult Waterfront Crossings



Source: North Waterfront Access Project

Figure 57: Pavement Treatments can Serve as a Wayfinding Device at Key Pedestrian Connections



Source: Center City Open Space Strategy

Transit Connections

Existing transit service to the waterfront is provided primarily by King County Metro Transit Route 99 (the Waterfront Streetcar) and Route 97, a privately subsidized

"partnership route" with stops in the retail core and on Elliott Avenue W. Existing service provides limited connections and limited frequency. Improved service could influence waterfront parking in several ways. Transit trips might replace some auto trips, and remote parking facilities might absorb some of the parking demand. The visitor survey suggests that visitors have limited interest in taking a shuttle from a remote parking location. A transit connection to the retail core might capture some auto trips, however, because of the related trip purposes (visitors may combine waterfront and retail core trips).

Transit Opportunities Route 97 & Potential Improvements

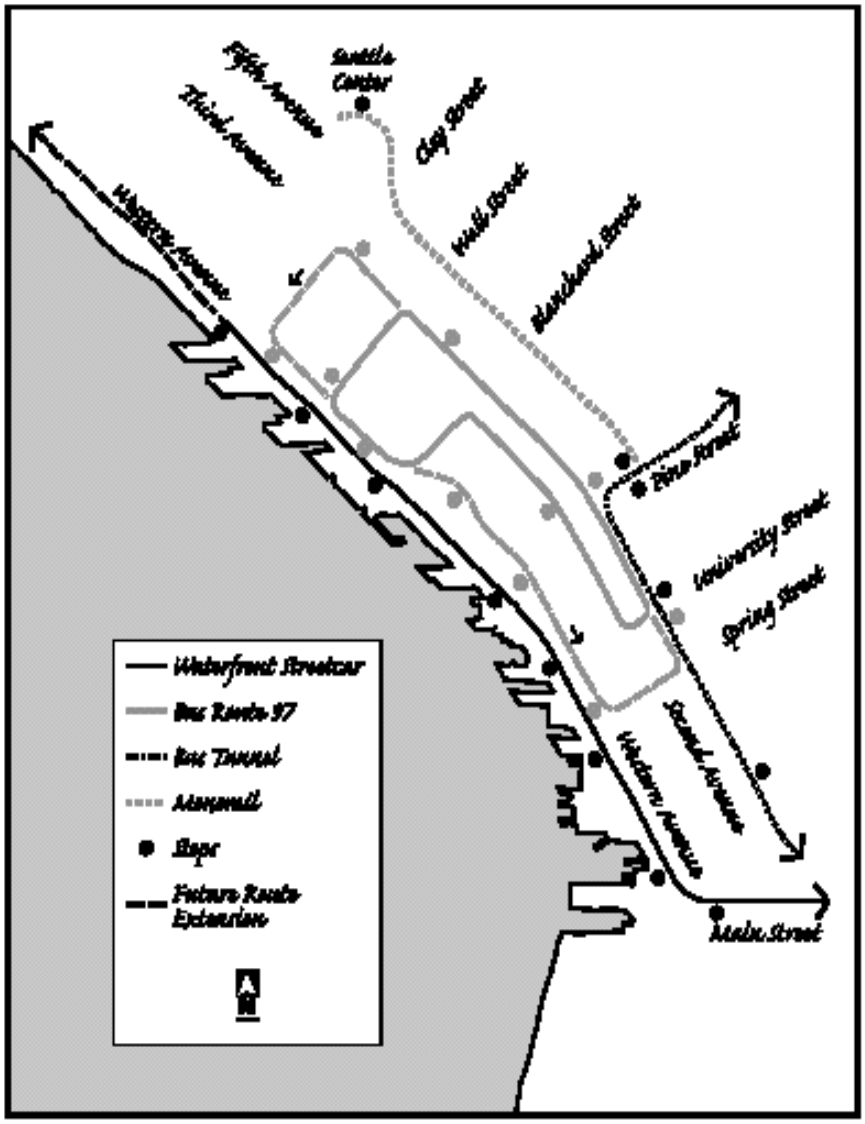
The existing Metro Bus Route 97 was developed to serve commute trips to offices along Elliott Avenue (at the World Trade Center and Seattle Trade & Technology Center buildings). The route links these employment sites to the Downtown Seattle Transit Tunnel and major bus routes at Third Avenue and Pine Street. Frequent service (every ten minutes) is provided during peak commuting periods, and the service is provided only on weekdays. The route uses a special 20-passenger shuttle bus rather than a full-sized Metro bus. The operating cost of the route is less than $200,000 per year, with 85% of the cost covered by the partners and just 15% Metro operating subsidy.

Figure 58 shows a possible expansion of the Route 97 to serve additional waterfront and retail core destinations. This route would provide a circulation from the waterfront to the retail and office/hotel core, complementing the Waterfront Streetcar service, which connects the waterfront to the regional transportation hub at Union Station and King Street Station. An additional operating subsidy would be required to expand the route and to provide frequent service on summer weekends and summer weekday afternoons. Waterfront parking partners might consider joining existing Route 97 partners to provide the additional operating subsidy, which would likely be in the $100,000 to $200,000 range.

Waterfront Streetcar Improvements

The City recently completed a study of improvements to the Waterfront Streetcar, including more frequent service on the existing route. These Waterfront Streetcar improvements would not provide a connection to the retail core, but could make transit a more attractive option for some waterfront visitors by improving connections to regional transit at the International District transit tunnel station. Perhaps more significantly, more frequent Waterfront Streetcar service could contribute to the success of a waterfront parking management program by providing easier connections between the featured parking facilities and the specific destinations.

Figure 58: Transit Opportunities



Parking Management and Coordination

One of the most striking findings of the visitor survey is that waterfront visitors typically spent twenty minutes looking for a parking space. Many visitors reported passing up an available space to look for a more convenient or less expensive space. These findings are consistent with the results of the market analysis, which shows that while the parking supply is sufficient to meet demand, most of the conveniently located parking is not conveniently priced (see Table 2). On-street meters are best for short visits, while off-street spaces are often priced to favor "early-bird" arrivals for commuter parking.

To serve Market shoppers, Aquarium visitors, tourists and the like, a portion of the waterfront parking supply must be managed to meet their needs. Pricing should favor the

relatively short-term stay of these visitors over all-day commuter parking, marketing and advertising materials should identify the facilities that cater to these visits, signage and streetscape elements should help these visitors find the featured parking facilities, and good pedestrian connections to the facilities should be provided.

Featured Facilities

While Waterfront parking partners will ultimately decide which facilities to feature in partnership with parking providers, appropriate facilities include:

Existing Facilities

The Bell Street Pier Garage

Owner/Operator:	Port of Seattle
Capacity:	1,700 spaces
Vehicular Access:	Elliott Avenue, Alaskan Way via Wall Street
Pedestrian Access:	Alaskan Way via at-grade crossing of railroad at Wall Street and via Bell Street Pedestrian Bridge; Elliott Avenue
Destinations Served:	Bell Street Pier (Odyssey Maritime Museum, Restaurants, Conference Center, Cruise Seattle terminal); Three Blocks to Pike Place Market
Opportunities:	Wayfinding & Marketing aimed at Pike Place Market visitors could expand usage as overflow Market parking.

Public Market Parking Garage

Owner/Operator:	Pike Place Market Preservation & Development Authority
Capacity:	500 spaces
Vehicular Access:	Western Avenue, Alaskan Way
Pedestrian Access:	Western Avenue, Alaskan Way, Bridge to Market
Destinations Served:	Pike Place Market, Seattle Aquarium
Opportunities:	Raising "Early Bird" specials and 6-10 hour rates during peak season would create additional capacity for Market visitors.

Republic Parking—Surface Lot at Spring & Western

Owner/Operator:	Republic Parking
Capacity:	200 spaces
Vehicular Access:	Western Avenue, Alaskan Way, Spring Street
Pedestrian Access:	Western Avenue, Alaskan Way, Spring Street, Harbor Steps via Seneca and Western
Destinations Served:	Seattle Aquarium, Seattle Art Museum
Opportunities:	Waterfront parking partnership could lease this facility during the peak season and incorporate it into the pricing/marketing strategy.

Potential Featured Facilities (Future)

Olympic Sculpture Park Parking

General purpose parking at this facility could serve central waterfront uses if Waterfront Streetcar service is increased and if owner/operator participates in the parking partnership.

Market PC-1 Site

Up to 150 net new spaces could be provided at this site, effectively expanding the capacity of the Public Market Garage.

Parking Structure at Republic Parking Site

Current conceptual alternatives for the Alaskan Way Viaduct project identify this site as a potential location for a parking structure to replace parking eliminated as part of the project. Even if no new spaces are created on a net basis, consolidation of waterfront parking supply into a public facility at this site would complement the featured facilities strategy.

Pricing

Currently, pricing at several key waterfront parking facilities favors long-term parking over short-term parking (Table 2). Even where short-term parking rates are affordable (Public Market Garage), long-term rates are also affordable, so commuters eligible for "early-bird" rates may occupy many of the available spaces. Pricing that favors short-term parking would increase the supply of parking available for waterfront visitors. Coordinated pricing at key facilities makes it possible to provide information about the most convenient parking options to waterfront visitors.

Parking providers that are also short-term activity generators (e.g. Port of Seattle Bell Street Pier, Pike Place Market) have the greatest incentive to adjust their pricing to serve short-term visitors. Other providers may follow suit to compete, or could be given incentives to adjust their pricing. Pricing can be varied by season to maximize revenue.

Information and Marketing

Once a short-term parking strategy is in place at several key facilities, those facilities can be featured in marketing materials and advertising. This includes activity-specific marketing and advertising (e.g., Aquarium, Pike Place Market) and joint marketing/ advertising efforts for the waterfront.

Improving Access Wayfinding

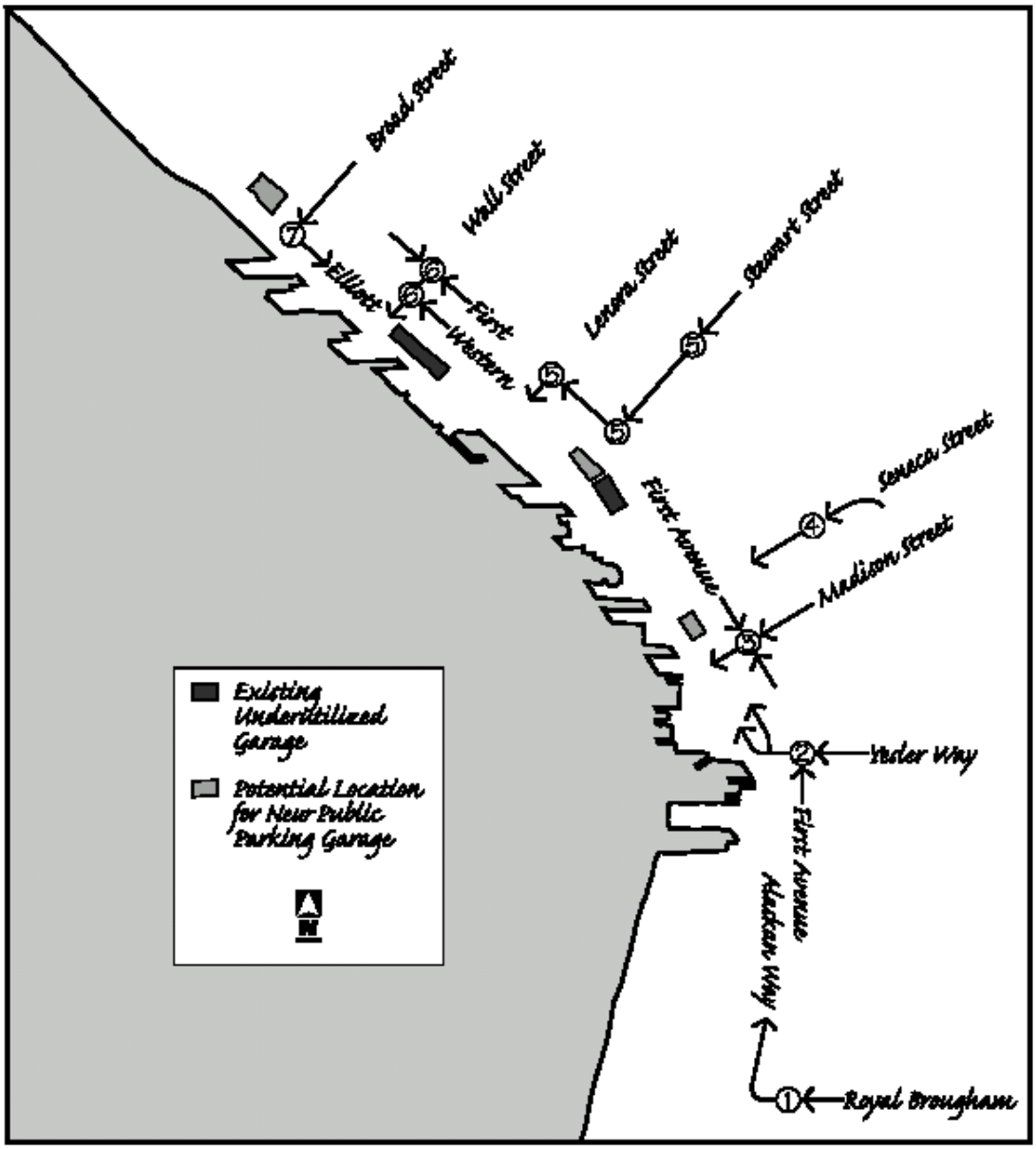
Wayfinding—including signage and streetscape elements—can be strategically improved with a focus on the featured parking facilities. The City has developed a downtown-wide wayfinding concept and implemented a demonstration of the pedestrian wayfinding elements. Waterfront parking partners could facilitate implementation of both vehicular and pedestrian wayfinding improvements within the study area for the Waterfront Parking Strategy.

Figure 59 identifies the major vehicular access routes (listed below) that should be included in a signage system to link primary travel routes to the waterfront with parking facilities. The goal is to direct vehicles to Alaskan Way, Elliott Avenue or Western Avenue. The featured facilities can be identified with the international parking symbol.

1. South Downtown Connections: The waterfront area may be accessed through the South Downtown area via I-5 and SR 519 (S Royal Brougham Way and S Atlantic Street) or via SR 99 southbound.
2. Pioneer Square Connection:
3. Lower First Avenue Connection:

4. Seneca Street/Cross Town Connection: Seneca Street provides downtown access from northbound I-5 and northbound SR 99. Directional signage for westbound movements Seneca and southbound 2nd Avenue (from SR 99 off ramp) should indicate the waterfront destination and connect to First Avenue directional signage.
5. Stewart Street/Cross Town Connection: Stewart Street is a major downtown access point from I-5. Directional signage for westbound movements should indicate the waterfront destination and connect to First Avenue directional signage.
6. Upper First Avenue Connection:
7. Waterfront access from First Avenue is limited.
8. North Downtown Connections: Broad Street should be signed for vehicles to turn onto Western Avenue to access public parking near the Pike Place Market.

Figure 59: Opportunities to Improve Vehicle Wayfinding



Implementing the Strategy

Creating a Parking Partnership: Structural Options

Creating a parking partnership is the key step toward implementation of the strategy. There are several structural options for such a partnership. The Waterfront Parking Strategy does not propose a specific approach to the partnership, but notes three key questions to be addressed: who are the partners, what is the instrument of the partnership, and who is the parking manager.

Who are the Partners?

The five partners who partnered to develop the Waterfront Parking Strategy are likely candidates for the parking partnership. However, some waterfront businesses and property owners that have to date participated indirectly as members of the Metropolitan Improvement District may wish to participate more directly in a parking partnership.

What is the Instrument of the Partnership?

There are several options for establishing the legal and institutional elements of the partnership—the instrument. Perhaps the most flexible instrument of partnership would be a contract. Prospective partners could negotiate all of the practical aspects of the partnership and enter into an agreement that reflects their understandings and commitments.

A new or existing entity could take on the implementation functions of the strategy. The existing institutional framework of the entity might serve as the primary instrument of partnership; for example, if the Metropolitan Improvement District acted as the parking manager, membership in the MID would be the primary instrument of partnership.

Who is the Parking Manager?

The parking manager could be private parking operator operating under contract to the partnership, one of the partners, or new entity such as a non-profit or public development authority.

New Parking Facilities

The Waterfront Parking Strategy identifies three key sites that present opportunities to develop new facilities that could be integrated into waterfront parking management. These sites are considered opportunities because of their proximity, visibility and accessibility to waterfront attractions and because of the compatibility of public parking with development plans for the sites. Parking development concepts for each site were considered to provide comparative information on the subsidy that might be required to provide public, short-term parking at each of the sites (given site characteristics and current market conditions).

Olympic Sculpture Park

The Seattle Art Museum has acquired two parcels for development of the Olympic Sculpture Park. Some parking is planned as part of the project, and the large site footprint

and accessibility of the upper parcel present an opportunity to integrate a large, multi-purpose parking facility into the project.
The site characteristics suggest the potential to develop a parking structure with up to 500 spaces. Projected demand indicates that a 325-space garage could be built at a cost of approximately $33,600 per stall. This cost estimate includes design fees, taxes, and financing costs. Demand projections incorporated OSP primary parking demand as well as demand generated by evening OSP events and general waterfront and business related demands. Revenue projections indicate that an annual subsidy of approximately $28 per space would be required.

Pike Place Market
The Pike Place Market PDA is currently conducting a site assessment of the PC-1 site. PDA studies indicate that up to 226 spaces could be developed on the site. Construction costs (not including design fees, taxes, finance costs) for a garage and above grade retail and residential uses were estimated at $5.2 M in 1998. The projection conducted for this study focused on just the 226-space garage component of the project and concluded that it would cost approximately $31,500 per space with a net annual income of approximately $140 per stall.

Spring & Western Block
Currently, Republic Parking operates a 200-space public parking facility at a surface lot on the block bounded by Spring Street, Western Avenue, Seneca Street and Alaskan Way. The site advantages include proximity to waterfront attractions, at grade access to the waterfront and downtown, vehicular access to the waterfront and downtown, and a large footprint allowing for efficient garage layout. The Spring & Western Block could serve as a site for replacement parking facilities that may be associated with some alternatives for replacement of the Alaskan Way viaduct.

Current code requirements would allow for an above grade seven-story structure that would provide 700 parking spaces. The cost estimate did not assume any retail on the ground floor but did allow for façade upgrades. The facility would cost approximately $25,800 per stall to build and provide an estimated annual net income of $1,300 per stall after dept service.

The assumptions used in this analysis and the findings are summarized in the following tables.

Table 13: Comparative Summary of the Three Sites Analyzed

Key Element	Western/ Spring Site	Sculpture Park Site	Market PC-1 Site
Number of stalls	700	325	226
Construction cost per stall	$25,797	$33,604	$31,519
Operating cost per stall	($2,202)	($1,313)	($1,333)
Net revenue per stall	$4,089	$2,438	$2,475
Income/(Subsidy) per stall after debt service	$1,300	($28)	$139

Table 14: New Waterfront Parking Facility – Summary of Sites

	Assumptions	Western/ Spring Property	Olympic Sculpture Park	Pike Place Market PC1 Site
	Development Costs:			
1.	Land Costs (1)	$8,750,000	$0	$0
2.	Construction Costs (2)	$15,350,960	$9,118,080	$5,568,582
3.	Additional Development Costs	$2,707,000	$1,803,266	$1,554,801
4.	Number of stalls	700	325	226
5.	Construction Cost to build/stall	$16,000	$18,000	$18,000
6.	Total cost per stall	$25,797	$33,604	$31,519
7.	Assumes government backed & issued bonds for financing	$0.06	$0.06	$0.06
8.	Total development costs	$26,807,960	$10,921,346	$7,123,383
9.	Cost of financing plus construction interest	$1,567,927	$730,000	$547,500
10.	**Total costs to be financed (100%)**	**$28,375,888**	**$11,651,346**	**$7,670,883**
11.	Annual debt payment	($1,952,414)	($801,675)	($527,798)
12.	Net Operating Income Available for debt payment	$2,862,314	$792,501	$559,292
13.	Net Operating Income for debt/per stall	$4,089	$2,439	$2,475
14.	Operating income/(deficit) projected (3)	$909,900	($9,175)	$31,494
15.	Operating income/(deficit) per stall	$1,300	($28)	$139

Notes:
(1) Property cost for Western Ave. property is determined to be $250/sf per conversations with Peter Shorrett Western Ave. property is 35,000 S.F. in size. The OSP upper yard is 165,816 S.F. in size
(2) Current parking garage construction costs provided by both Baugh Construction Co. and Sellen Construction Co.
(3) Hourly rates at OSP site are much lower than Western Avenue site. Also, occupancy rates are lower at OSP site

Table 15: New Waterfront Parking Facility – Development Costs

Cost Detail		Western/Spring Property	Olympic Sculpture Park	Pike Place Market PC1 Site
Construction Costs				
Cost per stall		$16,000	$18,000	$18,000
Number of stalls		700	325	226
Site square footage		35,000	165,816	44,000
No. floors for parking structure		7.00	2.00	3.00
Total garage construction costs		$11,200,000	$5,850,000	$4,068,000
Additional construction costs/facades		$1,000,000 (1)	$1,000,000 (2)	$0 (6)
Haz Mat Abatement		$200,000	$400,000	$200,000
Specialty Equipment		$300,000	$300,000	$300,000
Sales tax		$1,073,600	$602,800	$357,984
Contingency @ 10%		$1,377,360	$815,280	$492,598
Construction & Structural Testing		$200,000	$150,000 (3)	$150,000
Subtotal Construction Costs		**$15,350,960**	**$9,118,080**	**$5,568,582**
Additional Costs				
Architecture & Engineering	8.5%	$952,000	$638,266 7%	$389,801
Special Testing		$50,000	$50,000	$50,000
Specialty Consultants		$250,000	$100,000	$100,000
Permits & Fees		$65,000	$40,000	$40,000
Project Management Fees		$550,000	$450,000	$450,000
Project Reimbursable		$25,000	$25,000	$25,000
New utility hook ups		$300,000	$50,000	$50,000
Legal, site acquisition costs		$75,000	$50,000	$50,000
Builder's Risk Insurance		$65,000	$50,000	$50,000
Start Up & Opening Expenses		$50,000	$50,000	$50,000
Property Taxes		$25,000	$0	$0
Contingency		$300,000	$300,000	$300,000
Subtotal Additional Costs		**$2,707,000**	**$1,803,266**	**$1,554,801**
Total Development Costs		**$18,057,960**	**$10,921,346**	**$7,123,383**
Financing costs	1.5%			
Construction period interest for 12 months Western Ave. & Market sites & 8 months for OSP site	5.5%			
TOTAL COSTS WITHOUT FINANCING		**$18,057,960**	**$10,921,346**	**$7,123,383**

Notes:

(1) Western Avenue property is zoned DMC 140 with a retail frontage required on Western Ave. We have assumed an above-grade straight parking garage structure with no retail. However, we have added funds for façade upgrades.

(2) The Olympic Sculpture park site is very large and has a natural grade that eliminates the need for major excavation. All 500 stalls could be placed on one level with a waterproof cap set over it. The park itself would be above the parking structure.

(3) Specialty construction & testing is decreased because there is only one level of concrete & structure

(4) The need for utility hook-ups could be shared with the OSP infrastructure

(5) The Western Avenue site is zoned DMC 140. A short term parking garage is allowed by zoning code as a conditional use. The FAR on this site is 7, so we have assumed a 7 story above-grade parking garage which is the maximum that could be placed on this site. The code requires the 7th floor to be set back, so it would not be a full floor.

(6) Additional constructions costs for non-parking elements are not included in this estimate.

Table 16: Western/Spring Site – New Parking Facility Projected Income & Expense

Parking Rate & Demand Assumptions	
Morning occupancy rate	70%
Afternoon & evening occupancy rate	50%
Projected Rates:	
30 minutes-1 hour	$3.00
1-2 hours	$5.00
2-3 hours	$8.00
3-4 hours	$12.00
4 + hours	$15.00
Evening Rates (after 6 pm)	$10.00
Monthly rate	$200.00

Income Assumptions
70% of morning usage is assumed to be between 0-2 hours
60% of afternoon usage is assumed to be between 0-2 hours
20% of morning use is between 2-4 hours
30% of afternoon use is between 2-4 hours
20% of use is assumed to be full day (between 4-10 hours)
20% of use is assumed to be monthly parkers

Breakout of stalls	**No. of stalls**
Total no. stalls	700
Morning use @ 0-2 hours - 70% occupancy	490
Morning use @ 2-4 hours - 20% occupancy	140
Afternoon use @ 0-2 hours @ 60% occ	420
Afternoon use @ 2-4 hours @ 30% occ	210
Full Day Use @ 4-10 hours - 20%	140
Evening Use at 40% occ	280
Monthly Use	140

Annual Income Projection	
Morning Usage @ 85% occupancy	$1,716,960
Afternoon usage @ 65% occupancy	$1,379,700
Full Day @ 60% occupancy	$459,900
Evening usage @ 50%	$511,000
Monthly Usage	$336,000
Total Annual Income	**$4,403,560**

Operating Expenses:	
35% of income	**($1,541,246)**

Net Operating Income	**$2,862,314**
Net Operating Income Per Stall	**$4,089**

Table 17: Olympic Sculpture Park – New Parking Facility Projected Income & Expense

Assumptions	Summer		Non-Summer		Totals
	Weekday	Weekend	Weekday	Weekend	
Projected OSP Daytime Demand					
11-12PM	*66*	*101*	*32*	*70*	
12-1 PM	*124*	*117*	*59*	*81*	
1-2 PM	*126*	*103*	*60*	*71*	
2-3 PM	*83*	*114*	*39*	*79*	
3-4 PM	*63*	*131*	*30*	*91*	
4-5 PM	*21*	*49*	*10*	*34*	
Daily Demand	352	495	168	341	
Calendar Days	109	44	151	61	365
Annual Parking Hours	38,368	21,759	25,310	20,821	106,259
Hourly Parking Fee	$3.00	$4.00	$3.00	$4.00	$3.50
Daytime Revenue	**$115,104**	**$87,038**	**$75,931**	**$83,285**	**$371,907**
Projected OSP Evening Event Demand					
Event Days	45	35	60	50	190
Attendance per Event	75	100	75	100	
Parking Fee per Event	$3.00	$5.00	$3.00	$5.00	
Event Revenue	**$10,125**	**$17,500**	**$13,500**	**$25,000**	**$66,125**
Projected General Waterfront Demand					
Calendar Days	109	44	151	61	365
Daily Demand	175	200	50	75	
Annual Demand	19,075	8,800	7,550	4,575	40,000
Example Parking Fee	$10.00	$10.00	$10.00	$10.00	
Waterfront Revenue	**$190,750**	**$88,000**	**$75,500**	**$45,750**	**$400,000**
Projected Business Demand					
Calendar Days	109	44	151	61	365
Daily Long Term Demand	50	0	100	0	
Annual Long-Term Demand	5,450	0	15,100	0	20550
Long Term Parking Fee	$12	$12	$8	$8	
Long Term Revenue	$65,400	$0	$120,800	$0	$186,200
Daily Short-Term Demand	150	0	150	0	
Annual Short-Term Demand	16,350	0	22,650	0	39,000
Short -Term Parking Fee	$5	$5	$5	$5	
Short Term Revenue	$81,750	$0	$113,250	$0	$195,000
Business Revenue	**$147,150**	**$0**	**$234,050**	**$0**	**$381,200**
Annual Income	**$463,129**	**$192,538**	**$398,981**	**$154,035**	**$1,219,232**
Operating Expenses:					
35% of income					**($426,731)**
Net Operating Income					**$792,501**
Net Operating Income Per Stall					**$2,439**

Table 18: Pike Place Market PC1 Site – New Parking Facility Projected Income & Expense

Parking Rate & Demand Assumptions	
Morning occupancy rate	75%
Afternoon occupancy rate	75%
Projected Rates	
30 minutes-1 hour	$3.00
1-2 hours	$3.00
2-3 hours	$6.00
3-4 hours	$9.00
4 + hours	$12.00
Evening Rates (after 6 pm)	$5.00
Monthly rate	$125.00

Income Assumptions
5% of morning usage is assumed to be less than 1 hour
5% of afternoon usage is assumed to be less than 1 hour
80% of morning use is between 2-4 hours
80% of afternoon use is between 2-4 hours
10% of use is assumed to be full day (between 4-10 hours)
10% of use is assumed to be monthly parkers

Breakout of stalls	**No. of stalls**
Total no. stalls	226
Morning use less than 1 hour - 5% occupancy	11
Morning use @ 2-4 hours - 80% occupancy	181
Afternoon use less than 1 hour @ 5% occ	11
Afternoon use @ 2-4 hours @ 80% occ	181
Full Day Use @ 4-10 hours - 10%	23
Evening Use at 15% occ	34
Monthly Use @ 10% occ.	23

Annual Income Projection	
Morning Usage @ 80% occupancy	$380,485
Afternoon usage @ 80% occupancy	$380,485
Full Day @ 10% occupancy	$59,393
Evening usage @ 10%	$6,187
Monthly Usage	$33,900
Total Annual Income	**$860,450**

Operating Expenses:	
35% of income	**($301,157)**

Net Operating Income	**$559,292**
Net Operating Income Per Stall	**$2,475**

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Appendices

Appendix A Supplemental Parking Data

Appendix B Survey Questionnaire

Appendix C Parking Strategy Matrix

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Appendix A: Supplemental Parking Data

Existing On-Street Parking Supply and Demand

Existing Parking Supply and Demand for Stalls Located Under the Alaskan Way Viaduct

Existing Off-Street Parking Rates

Projected Changes in Off-Street Parking Supplies: South Zone

Projected Changes in Off-Street Parking Supplies: Central Zone

Projected Changes in Off-Street Parking Supplies: North Zone

Existing On-Street Parking Supply and Demand

On-Street Parking Type	Zone								Totals
	1 Stadium Area	3 Pioneer Sq.	4 Pioneer Sq. N.	5 Federal Bldg.	6 Central Waterfr.	7 Market Area	9 North Waterfr.	10 Belltown Area	
Un-Metered Stalls									
Restriction									
Peak Hour	*34*		*1*				*69*		*104*
Duration	*36*		*13*			*96*	*127*		*272*
Load zone	*24*	*10*	*5*	*22*	*45*	*60*	*71*	*62*	*299*
Motorcycle	*6*								*6*
Game Day	*18*								*18*
Reserved		*2*		*7*	*7*	*5*	*21*	*1*	*43*
Total Restricted	118	12	19	29	52	161	288	63	742
Total Un-Restricted	609	9	0	28	13	7	241	0	907
Total Supply	**727**	**21**	**19**	**57**	**65**	**168**	**529**	**63**	**1,649**
Demand	**582**	**13**	**9**	**15**	**24**	**106**	**311**	**42**	**1,102**
% Occupied	*80%*	*62%*	*47%*	*26%*	*37%*	*63%*	*59%*	*67%*	*67%*
Metered Stalls									
Supply	**201**	**316**	**82**	**41**	**491**	**156**	**538**	**272**	**2,097**
Demand	**110**	**228**	**35**	**26**	**371**	**117**	**317**	**224**	**1,428**
% Occupied	*55%*	*72%*	*43%*	*63%*	*76%*	*75%*	*59%*	*82%*	*68%*

Existing Parking Supply and Demand for Stalls Located Under the Alaskan Way Viaduct

Data collected on weekdays between 12 PM and 5 PM during the 2nd and 3rd weeks of May 2001.

Zone	Street Segment	From / To	Supply	Demand	Time Limits	Metered (y on n)	Notes
1	Under Viaduct	S of Jackson	6	6		n	8
1	Under Viaduct	S of Jackson	306	226		n	
1	Under Viaduct	S of Jackson	49	11	2 hr	y	7
3	Under Viaduct	Columbia to Jackson	6	6		n	
3	Under Viaduct	Columbia to Jackson	2	0	30 min	y	
3	Under Viaduct	Columbia to Jackson	81	70	2 hr	y	
6	Under Viaduct	Pike to Columbia	2	0		n	3
6	Under Viaduct	Pike to Columbia	2	0	3 min	n	1
6	Under Viaduct	Pike to Columbia	10	2		n	2
6	Under Viaduct	Pike to Columbia	1	0	2 hr	y	10
6	Under Viaduct	Pike to Columbia	10	0	2 hr	y	11
6	Under Viaduct	Pike to Columbia	10	0	2 hr	y	8
6	Under Viaduct	Pike to Columbia	14	7	30 min	y	
6	Under Viaduct	Pike to Columbia	247	200	2 hr	y	
Totals			**746**	**528**			

Existing Off-Street Parking Rates

Zone	0-2 hrs			Daily			Monthly			Early Bird			Total Supply
	Supply		Fee	Supply		Fee	Supply		Fee	Supply		Fee	
1	614	37%	$5.23	1,657	100%	$9.70	298	18%	$66.19	74	4%	$6.00	1,657
3	480	99%	$5.52	480	99%	$10.26	236	48%	$155.00	445	91%	$7.33	487
4	1,531	100%	$7.08	1,531	100%	$14.17	1,504	98%	$174.00	769	50%	$8.17	1,531
5	939	100%	$9.16	939	100%	$18.57	778	83%	$201.80	618	66%	$13.58	939
6	1,525	100%	$5.38	1,525	100%	$11.56	1,203	79%	$161.93	1,248	82%	$7.42	1,525
7	1,977	100%	$7.60	1,977	100%	$14.74	1,858	94%	$167.41	1,767	89%	$8.33	1,977
9	1,889	88%	$5.58	1,889	88%	$12.24	862	40%	$123.64	958	45%	$6.73	2,143
10	1,170	94%	$6.64	1,248	100%	$10.99	569	46%	$128.25	316	25%	$7.56	1,248

Projected Changes in Off-Street Parking Supplies - South Waterfront Zone

PSRC Zone	SPO Proj. #	Project Type	Status	Project Name	Address	Change in Parking Supply		Description
						Private	Public	
1	174	R	C	Florentine	526 1st Ave S	0	0	
1	232	NR	PMT	SW corner of King and 1st	83 S. King St	60	-98	7-story building, 202,000 SF office & 19,000 SF retail
1	262	NR	PMT	Washington Shoe Building	SW corner of Occidental and Jackson	0	0	renovation of existing structure for office and retail
1	264	NR	C	Provident Building		0	0	conversion to high tech office space and retail
1	265	NR	PRE	WOSCA Site	801 1st Ave S	300	-310	Office Development
1	NA	MU		North Stadium Lot	201 S King St.	0	?	Could affect 1,000 stalls.
3	101	R	UC	Terry Denny Building/Northern Hotel	109 1st Av S	0	0	Housing/work space for artists.
3	142	R	PMT	Occidental Building	115 Occidental Av S	0	0	Pioneer Square CDO Project
3	180	R	C	Waterfall Place	215 2nd Av S	0	0	
3	203	MU	C	Olympic Block	100 1st Av S	0	0	Office/Residential
3	266	NR	PRE	Occidental St. Bldg	Occidental & Main	0	-131	Martin Smith Real Estate and Diamond Parking
3	NA	MU	PRE	Pier 48	Pier 48	?	?	Potential mixed-use project.
4	77	MU	UC	Millennium Tower	925 1st Av	125	75	20-story mixed use tower. .
4	141	NR	UC	Butler Garage	114 James St	0	260	460 parking spaces on 12 levels, including existing 200 stalls on three levels; 2,700 SF retail
4	204	NR	PMT	Colman Tower	800 Western	187	-67	Office/Retail
Total Projected Change in Parking Supply						672	-271	

Projected Changes in Off-Street Parking Supplies - Central Waterfront Zone

PSRC Zone	SPO Project #	Project Type	Status	Project Name	Address	Change in Parking Supply		Description
						Private	Public	
5	198	NR	C	Second & Seneca Bldg.		0	0	Office
5	231	MU	PMT	Warshal's site	1000 1st Av	200	0	Mixed-use project with 120 room hotel and 72 housing units
6	NA	NR	PRE	Pacific NW Aquarium	Pier 59	0	0	
6	NA	?	PRE	Market PC-1 Site	1615 Western Ave	0	0	Could affect 87 stalls.
6	NA	?	PRE	?	1509? 2nd Ave	0	-50	
Total Projected Change in Parking Supply						200	-50	

Projected Changes in Off-Street Parking Supplies - North Waterfront Zone

PSRC Zone	SPO Proj. #	Project Type	Status	Project Name	Address	Change in Parking Supply		Description
						Private	Public	
9	5	R	C	The Concord	2929 1st Ave	204	0	
9	8	R	PMT	IBEW Project	2700 1st Av	175	0	12-story mixed use
9	14	R	UC		2717 Western Av	174	-8	Two residential towers:
9	17	R	PMT	Elliott & Clay Apartments	2716 Elliott Av	116	-20	13-story mixed use bldg.
9	20	R	C	Site 17 North Harbor Prop.	2500 Western Av	28	0	7-story apartment building
9	28	R	C	Elliott Pointe	2226 Elliott Av	0	0	
9	71	R	C	Site 17 Harbor Properties	2400 Western Av	80	-78	7-story residential
9	72	R	C	Belltown Lofts	2307 Western Av	40	0	
9	74	R	UC	Ellington & Avalon Belltown	2801 1st Av	525	-109	Mixed use with retail and two residential towers
9	84	NR	PMT	Mariott Hotel Site		300	0	320 room hotel
9	85	R	C	Waterfront Landings	1900 Alaskan Way	340	-159	
9	217	R	UC	The Olympus	Clay & Broad, Western & Elliott	410	-207	
9	218	MU	PMT		2721 1st Av	250	0	12-story residential/retail

Projected Changes in Off-Street Parking Supplies - North Waterfront Zone (continued)

PSRC Zone	SPO Project #	Project Type	Status	Project Name	Address	Change in Parking Supply		Description
						Private	Public	
9	219	MU	PMT	Intracorp	2716 Western Av	300	0	12-story residential/retail
9	246	NR	PMT		3104 Western Av	280	0	5-story commercial bldg.
9	247	R	PMT		3101 1st Av	0	0	6-story, low-income
9	248	R	PMT		3010 1st Av	0	0	
9	249	R	PMT		159 Denny Way	0	0	
9		NR	PRE	Olympic Sculpture Park	Broad & Elliott	0	141	Lose existing 59 stalls, construct 200 stalls
10	21	R	C	Belltown Heights (Pomeroy)	2319 1st Av	60	0	8-story mixed use residential building;
10	22	R	C	Dorothy Day House	2300 1st Av	0	0	Permanent housing for homeless women;
10	29	R	PMT	Bethel Temple Site	2033 2nd Av	200	0	23-story residential tower
10	33	R	C	One Pacific Tower	2000 1st Av	206	0	Highrise residential tower
10	67	R	C	Concept One	2219 2nd Av	140	0	
10	68	R	C	Ventana	2100 Western Av	60	0	8-story mixed-use project.
10	94	R	C	Austin Bell Building	2326 1st Av	55	0	Residential rehab/new construction
10	166	R	C	Elliott Court		0	0	
10	183	R	C	Oregon	2301 1st Av	0	0	
10	270	R	PMT		2233 1st Av	0	0	6700 SF commercial (restaurant) @ ground level
Total Projected Change in Parking Supply						3,883	-440	

Appendix B: Survey Questionnaire

Waterfront Visitor Survey
Final Survey 8-8-01

Introduction

Hi, my name is _____, and I am conducting a brief survey with waterfront visitors today on behalf of the City of Seattle-Strategic Planning Office. In appreciation for your time in completing the survey, I would like to offer you a $3 Starbucks gift certificate. First, I just have one quick introductory question to determine if you meet the criteria to complete the survey.
[IF NECESSARY ASK]: Are you 16 years of age or older?

Screener

SCR1 First, do you live within walking distance of your destination at the Waterfront today?

1 YES – LIVE WITHIN WALKING DISTANCE **[ASK Q1A AND THANK – TALLY AS SCR1=1]**
2 YES – WORK WITHIN WALKING DISTANCE **[CONTINUE]**
3 NO **[CONTINUE]**

[IF SCR1=2 or 3: 'Great, you meet the criteria to complete this survey.]

SCR2 Do you live here in the Seattle area, or are you visiting Seattle on vacation or a business trip?

1 LOCAL RESIDENT
2 VISITING / ON VACATION / BUSINESS TRIP
3 OTHER: [SPECIFY_____]

SCR3 What is your home zip code? _____

Travel Mode

Q1A How did you travel to the Waterfront today?

[SELECT ALL THAT APPLY FOR COMBINATIONS]

1 DRIVE ALONE, **[SKIP TO Q1C]**
2 CARPOOL (THAT IS DRIVE WITH 2 OR MORE PEOPLE IN THE CAR), **[SKIP TO Q1C]**
3 TAKE THE BUS, **[SKIP TO Q1C]**
4 TAKE A SHUTTLE OR TAXI, **[SKIP TO Q1C]**
5 BICYCLE, **[SKIP TO Q1C]**
6 TAKE THE WATERFRONT TROLLEY,
7 ARRIVE ON THE FERRY AS A WALK-ON PASSENGER **[SKIP TO Q1C]**
8 ARRIVE ON THE FERRY AS A 'DRIVE-ON' PASSENGER, OR **[SKIP TO Q1C]**

9 WALK? **[SKIP TO Q1C]**
10 OTHER: [SPECIFY_____] **[SKIP TO Q1C]**
11 DON'T KNOW **[SKIP TO Q1C]**

Q1B **[ASK IF Q1A=6]** How did you get to place that you boarded the trolley?
1 DRIVE ALONE,
2 CARPOOL (THAT IS DRIVE WITH 2 OR MORE PEOPLE IN THE CAR),
3 TAKE THE BUS,
4 TAKE A SHUTTLE OR TAXI,
5 BICYCLE,
6 TAKE THE WATERFRONT TROLLEY, OR
7 WALK?
8 OTHER: [SPECIFY_____]
9 DON'T KNOW

Q1C Did you consider any other modes of traveling to the Waterfront today? **[IF YES ASK]:** Which ones?

[SELECT ALL THAT APPLY FOR COMBINATIONS]
1 NO – NO OTHER MODES CONSIDERED
2 YES – DRIVE ALONE
3 YES – CARPOOL
4 YES – BUS
5 YES – BICYCLE
6 YES – SHUTTLE/TAXI
7 YES – WALK
8 YES – FERRY WALK-ON
9 YES – FERRY DRIVE-ON
8 YES – OTHER: [**SPECIFY**_____]
9 DON'T KNOW

Q1D For what reasons did you choose to **[RESTATE TRAVEL MODE FROM Q1A]** to the Waterfront today, as opposed to another mode of travel?

[SELECT ALL THAT APPLY]
1 TO SAVE MONEY
2 TO GET HERE QUICKLY
3 NEED TO HAVE MY CAR AS GOING SOMEWHERE ELSE AFTER THIS / NEEDED TO BE SOMEWHERE PRIOR TO THIS
4 NEEDED TO HAVE CAR TO CARRY ITEMS SUCH AS LUGGAGE, GROCERIES, OTHER ITEMS.
5 NEEDED TO HAVE CAR AS HAD KIDS / OTHER PASSENGERS TO TRANSPORT
6 NOT AWARE OF OTHER OPTIONS
7 NICE DAY
8 LOW COST
9 DIDN'T WANT THE HASSLE OF PARKING
10 EXERCISE
11 NO OTHER CHOICE
12 FLEXIBILITY TO COME AND GO AS I PLEASE
13 TO SAVE THE ENVIRONMENT
14 SAFER THAN OTHER ALTERNATIVES

15 OTHER [**SPECIFY**_____]
16 DON'T KNOW

Q2A **[ASK IF Q1A= 1 THROUGH 2 OR 4 THROUGH 9]** What is the main reason you did not take the bus to Waterfront today?
SPECIFY: _____

Q2B **[ASK IF Q1A=3]** What is the main reason you rode the bus to Waterfront today?
SPECIFY: _____

Waterfront Usage

Q3 Have you ever visited the Seattle Waterfront before today?
[IF YES]: About how many times have you visited the Waterfront in the last year? **[IF NECESSARY STATE]:** Your best estimate is fine.
1 NO – 0 TIMES
2 YES – ENTER # OF TIMES_____
9 DON'T KNOW

Q3A Now, just thinking about your trip today, **[ADD IF Q1A=1 OR 2: And including time spent looking for parking]** what time did you arrive at the Waterfront?
ENTER TIME: ____:____ **[EX 1:30 PM OR 10:25 AM]**

Q3B And what time do you plan on leaving the Waterfront?
[IF NECESSARY]: Your best estimate is fine.
[ENTER CURRENT TIME IF RESPONDENT IS DEPARTING]
ENTER TIME: ____:____**[EX 1:30 PM OR 10:25 AM]**

Q4 For what reasons are you visiting the Waterfront today?
[SELECT ALL THAT APPLY – INDICATE FIRST RESPONSE WITH A STAR]
1 SHOPPING
2 DINING
3 TO VISIT THE WATERFRONT
4 TO SIGHTSEE
5 FOR RECREATION [EXERCISE, WALK, ETC.]
6 TAKE A CRUISE
7 FERRY DOCK
8 BUSINESS
9 OTHER [SPECIFY:_____]
10 DON'T KNOW

Q5 Next I would like to know about the specific destinations you visited or are going to visit at the Waterfront today and approximately how much time you spent or plan to spend at each.

[**NOTE:** PROBE FOR SPECIFIC STORE/RESTAURANT/PARK/ATTRACTION NAMES (I.E. AQUARIUM, PIKE PLACE, MYRTLE EDWARDS PARK, VICTORIA CLIPPER, ARGOSY, IVARS, ETC.) BUT MAY BE 'WATERFRONT' AS A WHOLE. ALSO, VISITORS MAY NOT RECALL THE NAMES OF THE STORES THEY WENT INTO IF THEY WERE JUST 'SHOPPING' OR 'SIGHTSEEING'] **[RECORD UP TO THREE DESTINATIONS.]**

a) What is/was your primary destination? _____
a1) And approximately how much time did or will you spend there? ____:____
[RECORD TIME IN HOURS AND/OR MINUTES, EX. ONE HOUR AND ½ HOURS = 1:30]
b) What is/was your next destination? _____
b1) And approximately how much time did or will you spend there? ____:____
c) What is/was your next destination? _____
c1) And approximately how much time did or will you spend there? ____:____

Parking Behavior

[ASK Q7 THROUGH Q13B IF Q1A = 1 OR 2 – ALL OTHERS SKIP TO Q14INTRO]

Q7 In which zone did you park your vehicle for your Waterfront visit today?
[SHOW PARKING ZONE MAP]
ENTER ZONE # _____
99 PARKED OUTSIDE OF ZONE MAP SPECIFY CROSS STREETS _____

Q8 Did you park…
1 In a metered parking spot,
2 In a lot where you take a ticket upon arrival and pay when you leave,
3 In a lot where you pre-pay for your parking spot upon arrival, or
4 Did you find free parking on the street?
9 DON'T KNOW

Q9A How much [**CIRCLE APPROPRIATE:** did you / do you plan to] pay for parking at the Waterfront today?
ENTER DOLLAR AMOUNT $____.____

Q9B **[IF Q8 = 2 OR 3]** Is this an early-bird rate or other special rate?
1 YES
2 NO
10 DON'T KNOW

Q10 Approximately how long did you spend looking for parking at the Waterfront today?
ENTER TIME IN MINUTES _____

Q10A How much time did you expect to spend looking for parking at the Waterfront today?

ENTER TIME IN MINUTES _____

Q10B How much time are you willing to spend looking for parking at the Waterfront before you abandon the Waterfront as your destination?

ENTER TIME IN MINUTES _____

Q11A Did you call ahead, look online, or use any other source to research parking options or directions when making your trip to the Waterfront today?

1 YES [**ASK:** What is the main reason you researched your parking options ahead of time? (SPECIFY): _____]
2 NO [**ASK:** What is the main reason you did not research your parking options ahead of time? (SPECIFY): _____]
9 DON'T KNOW

Q11B **[IF Q11A = 1]** Which specific sources did you use to research parking options or directions when making your trip to the Waterfront today?

1 PHONE CALL TO A WATERFRONT DESTINATION
2 PHONE CALL TO OTHER: [SPECIFY _____]
3 RESEARCH ONLINE / INTERNET WEB SITE
4 CONSULTED FRIENDS / FAMILY
5 STREET SIGNAGE AT OR NEAR WATERFRONT
6 MAP
7 LOOKED IN HOTEL BROCHURE [SPECIFY BROCHURE: _____
8 OTHER: [SPECIFY_____]
9 DON'T KNOW

Q11C **[IF Q11A = 1]** What types of information would you have liked to see that you did not find in researching parking options for your Waterfront trip today?

[OPEN-END: _____

Q11D **[IF Q11A = 1]** Approximately how long did you spend researching parking options or directions prior to making your trip to the Waterfront today?

ENTER TIME IN MINUTES _____

Q11E What would be the best way for the Waterfront to communicate your parking options to you?

1 HAVE A WATERFRONT WEB SITE WITH PARKING OPTIONS LISTED
2 HAVE PARKING OPTIONS LISTED IN BROCHURE AT HOTEL
3 LIST PARKING OPTIONS ON AQUARIUM WEBSITE
4 LIST PARKING OPTIONS ON PORT WEBSITE
5 LIST PARKING OPTIONS ON PIKE PLACE MARKET WEBSITE
6 IMPROVE SIGNAGE TO AVAILABLE PARKING
7 INCLUDE A 'GENERAL WATERFRONT INFORMATION' NUMBER IN THE TELEPHONE BOOK

8 OTHER [SPECIFY: _____]
9 DON'T KNOW

Q12 For what reasons did you choose your final parking location today? **[SELECT ALL THAT APPLY - INDICATE FIRST RESPONSE WITH A STAR]**

1 IT WAS THE FIRST SPOT LOCATED
2 EXPERIENCE / PARKED THERE BEFORE
3 INFO GIVEN WHEN CALLING AHEAD OR LOOKING ONLINE
4 WORD OF MOUTH / SUGGESTION FROM OTHERS SUCH AS FAMILY/FRIEND – NOT A WATERFRONT EMPLOYEE
5 SIGNAGE
6 PRICE
7 PROXIMITY TO DESTINATION
8 SAFETY
9 OFFERED EASY ACCESS TO WATERFRONT (NO HILL-CLIMB IN OUR OUT)
10 OTHER [SPECIFY: _____]
11 DON'T KNOW

Q13A When looking for parking today, did you pass up any open spot or available lot **before** choosing your final parking location?

1 YES
2 NO
9 DON'T KNOW

Q13B **[ASK IF Q13A = 1]** Why did you pass up an open spot or available lot before choosing your final parking location? **[SELECT ALL THAT APPLY - INDICATE FIRST RESPONSE WITH A STAR]**

1 DIDN'T SEE THE SIGNAGE UNTIL HAD ALREADY PASSED BY
2 TOO EXPENSIVE
3 LOT DIDN'T LOOK SAFE
4 WAS LOOKING FOR A SURFACE / OUTSIDE LOT NOT A GARAGE
5 WAS LOOKING FOR A GARAGE NOT A SURFACE / OUTSIDE LOT
6 TOO FAR FROM WATERFRONT / FINAL WATERFRONT DESTINATION
7 WOULD HAVE HAD TO CLIMB UP OR DOWN HILL TO GET TO WATERFRONT FROM LOCATION – TOO DIFFICULT TO ACCESS WATERFRONT FROM LOCATION
8 OTHER [SPECIFY: _____]
9 DON'T KNOW

Parking Perceptions – ALL RESPONDENTS

Next, I have some questions about parking at the Waterfront in general.

Q14INTRO How important **to you** are the following attributes in choosing where you park when visiting the Waterfront? Please use a scale from 1 to 5 where '1' means 'not at all important' and '5' means 'extremely important.' You may also use any number in between.

1 NOT AT ALL IMPORTANT
2
3
4
5 EXTREMELY IMPORTANT
9 DON'T KNOW

Q14A How important is…Cost of parking ____

Q14B How important is…Proximity of parking to your Waterfront destination ___

Q14C How important is…Easy access to your vehicle _____

Q14D How important is…The ability to come and go as you please from your parking location _____

Q14E How important is…Covered parking _____

Q14F How important is…Quickness of locating an available spot _____

Q14G How important is…Access to parking, that is signage or directions to parking, at the Waterfront? _____

Q14H How important is…The availability of parking, that is the number of parking locations and spaces, at the Waterfront? _____

Q14I Ease of access to the Waterfront, that is having a hill climb or elevator to get to the waterfront?

Future Use

Q15A If a circulator bus were available that would travel between the Waterfront, Pioneer Square, the Central Business District, and the Seattle Center how likely would you be to park or bus to the circulator and take the circulator to the Waterfront?

1 Very Likely
2 Somewhat Likely
3 Neutral
4 Not Very Likely
5 Not At All Likely
9 Don't Know

Q15B What improvements to public transportation would need to be made along the Waterfront in order for you to consider using transit or using transit more often to travel to the Waterfront?
SPECIFY: _____

Q15C How likely are you to visit the Waterfront again in the next year?

1 Very Likely
2 Somewhat Likely
3 Neutral
4 Not Very Likely
5 Not At All Likely
9 Don't Know

Q16INTRO If you were to visit the Seattle Waterfront again in the future, how likely would you be to travel here in the following ways? Please tell me whether you would be 'very likely,' 'somewhat likely,' 'not very likely,' or 'not at all likely' to use each one.

1 Very Likely
2 Somewhat Likely
3 Neutral
4 Not Very Likely
5 Not At All Likely
9 Don't Know

Q16A How likely would you be to…drive and park at the Waterfront? ____

Q16B How likely would you be to…take a bus to the Waterfront? _____

Q16C How likely would you be to…take a taxi or shuttle to the Waterfront? _____

[NOTE: FOR THIS SERIES SHOW LOCATION OF SEATTLE CENTER AND STADIUM ON MAP TO RESPONDENT AS NECESSARY]

Q16D If daily parking were offered for $6 at the Seattle Center how likely would you be to…drive, park at this location and ride a shuttle to the Waterfront that costs from $0 to $2? _____

Q16E If daily parking were offered for $6 at the Stadium how likely would you be to…drive, park at this location and a ride shuttle to the Waterfront that costs from $0 to $2? _____

Q16F If it were offered for $10 to $15 for up to 4 hours, how likely would you be to…use valet parking at the Waterfront? _____

Q17 You said you paid **[RECALL PARKING PRICE FROM Q9A]** to park at the Waterfront today.
Now, how much would parking at the Waterfront have to cost before you would choose not to visit the Waterfront?
ENTER PRICE $____.____

Q18 And, keeping in mind the amount you paid for parking **[RECALL PARKING PRICE]** at the Waterfront today how much would parking at the Waterfront have to cost before you would use a travel mode other than a car?
ENTER PRICE $____.____

Demographics

Finally, I have some background questions that will be used to group your answers with those of other people like yourself:

Q19A Including yourself, how many people are visiting the Waterfront with you today?
ENTER NUMBER _____

Q19B **[IF Q6A > 1]** How many of these people are between the ages of 18 and 35?
ENTER NUMBER _____

Q19C **[IF Q6A > 1]** How many of these people are between the ages of 36 and 65?
ENTER NUMBER _____

Q19D **[IF Q6A > 1]** How many of these people are over the age of 65?
ENTER NUMBER _____

Q19E **[IF Q6A > 1]** How many of these people are children ages 10 to 18?
ENTER NUMBER _____

Q19F **[IF Q6E > 0]** How many of these children are age 9 or younger?
ENTER NUMBER _____
[CHECK THAT Q6B – Q6E SUM TO Q6A]

Q20 What is <u>your</u> age? ____
99 REFUSED **[SKIP TO Q20A]**

Q20A [IF Q20 = 99] Which of the following categories includes your age?
1 18 to 24,
2 25 to 34,
3 35 to 44,
4 45 to 54,
5 55 to 64, or
6 65 or older?
10 REFUSED

Q21 Are you employed…?
1 Full-time,
2 Part-time,
3 Self-employed,
4 A student,
5 Not employed outside the home or a homemaker,
6 Retired, or
7 Currently unemployed?
9 DON'T KNOW

Q22 For the purposes of comparing answers only, could you please name the letter on this card **[SHOW RESPONDENT INCOME CARD]** that best corresponds to your total annual household income?
A (LESS THAN $20,000)
B ($20,000 TO LESS THAN $35,000)
C ($35,000 TO LESS THAN $50,000)
D ($50,000 TO LESS THAN $75,000)
E ($75,000 TO LESS THAN $100,000)
F ($100,000 OR MORE)
98 DON'T KNOW
99 REFUSED

Q23 RECORD GENDER
1 MALE
2 FEMALE

THANK1 – NON-QUALIFIERS – Those are all the questions I have. I'm sorry, you don't meet the criteria for this particular study but I thank you very much for your willingness to participate.

THANK2 – COMPLETED INTERVIEWS – Those are all the questions I have. Thank you so much for your time today and here is your coffee certificate.

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Appendix C: Parking Strategy Matrix

Strategy	Strategic Elements		
	Capital	**Operational**	**Political**
A. Increase Parking Supply	**1. Subsidize construction or price of off-street parking.** **2. Access remote parking supplies with a shuttle service.** 3. **Construct new public parking supplies**. *4. Widen street to increase on-street parking as part of new construction.*	**5. Redesign existing facilities to increase supply.**	*6. Establish code requirements to replace existing short-term parking supplies on sites proposed for re-development.* *7. Create code requirements that address shared parking options.* *8. Provide development incentives (e.g., increased FAR) to construct additional short-term parking with new development.*
B. **Use Existing Parking Supplies More Efficiently**	**9. Provide pedestrian improvements and signage programs to create links with underutilized supplies. (wayfinding and urban design improvements)** **10. Develop valet parking programs.**	**11. Provide information to users (internet).** **12. Encourage use of fringe parking.** **13. Share parking (residential/commercial)** **14. Establish a parking brokerage service to make the best use of existing supplies.** 15. **Develop seasonal parking plan to respond to peak summer weekday demands.**	**16. Regulate pricing and enforcement of parking more effectively to encourage short-term use.**

Strategy	Strategic Elements		
	Capital	**Operational**	**Political**
C. **Reduce Long-Term Parking Demand to Increase Short-Term Supply**	*17. Subsidize transit passes for employees in Waterfront area.*	*18. Market commute alternatives for employees and travel alternatives for tourist and recreational visitors to the Waterfront.* *19. Create a Transportation Management Association to provide businesses in the with information about commuting options.*	**20. Implement pricing strategies to discourage long-term and encourage short-term parkers.**
D. **Improve Transit Access and Service to the Waterfront.**	**21. Pricing - Extend free ride zone to the Waterfront.** **22. Access – Expand local circulator.** *23. Service – Improve routing of existing Route # 16 and/or 97.* *24. Access – Improve integrate trolley into Waterfront transportation system.*	**25. Tour Bus Access/Parking – Provide locations for tour/school buses to drop-off/pick-up passengers at major destinations (e.g., Victoria Clipper, Aquarium) and provide remote areas for bus parking while waiting for passengers.**	
E. Manage On-Street Parking during Major Construction Projects.	*26. Secure off-site parking during times when parking along Alaskan Way or under the Viaduct would be displaced for major construction.* *27. Provide shuttle service to remote parking locations.*	*28. Provide information to tourists and other visitors about alternative parking locations.*	